CLAUDE PROJECTS · GUIDE 1 OF 3

Claude Projects
The hands-on guide

How to set up a project in the Claude desktop app, fill it with what Claude needs, and keep it working for you.

Checked against Anthropic's docs on 10 November 2026.

Alex Kerss

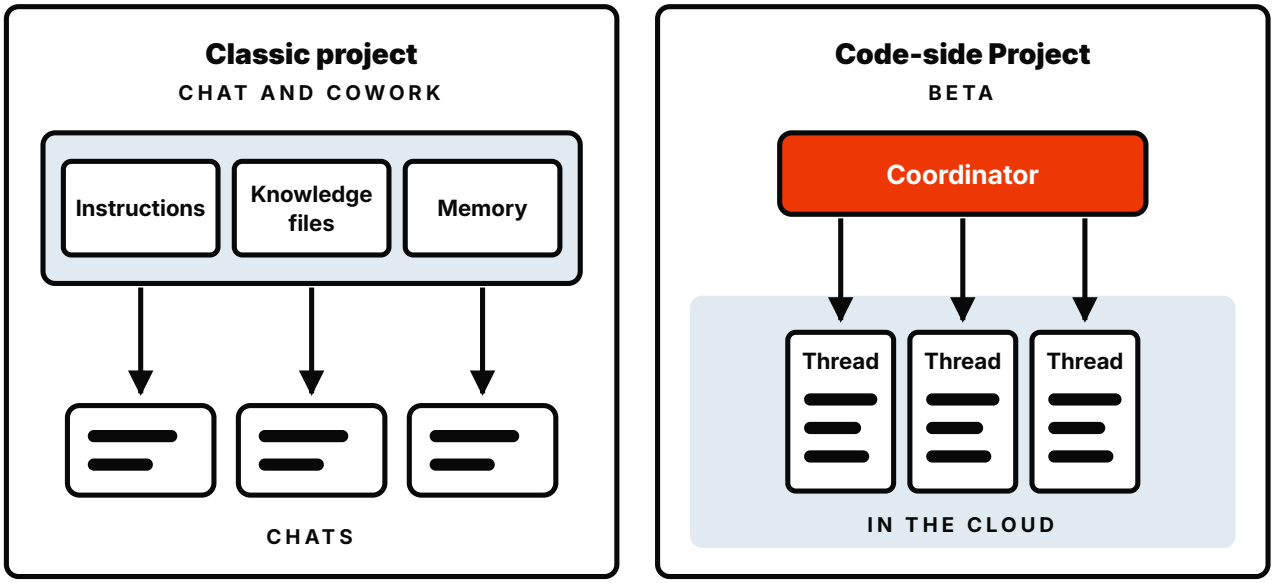
SECTION 1

Two different things are called Projects

There are now two features in the Claude app with the same name, and they work in completely different ways.

The first is the **classic project**. It lives on the chat side of the app, which since September also covers Cowork, because chat and Cowork merged into one Claude. A classic project is a home for one area of your work. It holds a set of instructions, a set of reference files Claude calls knowledge, its own chats and its own memory. Every chat you start inside it begins with the instructions and files already loaded. Classic projects are on every plan, including Free.

The second is **Projects on the Code side**, in the Code tab of the desktop app and at claude.ai/code. These launched in September as a public beta on Pro, Max and Ultra. Here a project is one long conversation with a coordinator. You tell it what needs doing, and it starts separate threads that run the work in parallel in the cloud. It's built mainly for ongoing work on code stored on GitHub.



The two don't share files or memory, and instructions written for one never reach the other. Most of this guide is about the classic project. The Code-side version gets its own section near the end, with a warning about how quickly it can eat into your plan.

SECTION 2

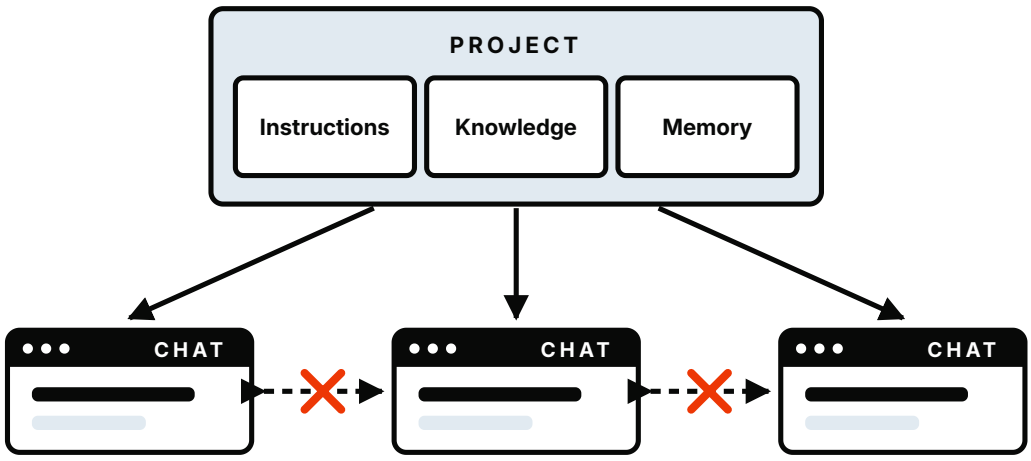
What a classic project actually does

The thing to understand is that a project doesn't make Claude remember your conversations with each other. What it does is give every chat the same starting point.

When you start a chat inside a project, Claude reads the project's instructions, files and memory before your first message. That's why a new chat in a project already knows the format of your weekly sales report, when an ordinary new chat has no idea.

What a chat in a project does **not** get is the content of the other chats. If one chat produces a summary that the next chat needs, Claude won't find it there on its own. You need to add that summary to the project's knowledge, and from then on every chat can read it.

So a good project is one area of work you come back to again and again, with a fixed body of reference material, such as customer email replies for one product. A one-off question doesn't need a project at all.



Chats don’t see each other

SECTION 3

Create a project

1. In the left sidebar, click **Projects**. On the web you can also go straight to claude.ai/projects.
2. Click **+ New Project** in the top right.
3. Give the project a name and a short description.
4. On a Team or Enterprise plan, choose **Keep it private** or **Share with your broader organization**.
5. Click to create it. The project page opens.

••• SCREENSHOT 1

the New Project dialog in the desktop app's Claude tab, with the name and description fields filled in and the create button visible.

One thing to know about the name and description: Claude can't see them. They're only there to help you find the project. If Claude needs to know what the project is for, that goes in the instructions, which I'll cover next.

On the Free plan you can have up to five projects. Anthropic doesn't publish a project limit for the paid plans.

On Enterprise, your organisation may require a value for each **tag** when you create a project. Everyone in the organisation can see tags, so keep anything private out of them.

To keep a project at the top of your sidebar, star it. Click the star in the top right of the project page, or click the three dots next to it on the Projects page and choose **Star**. Starred projects show in the left panel.

SECTION 4

Write project instructions

Project instructions are the standing brief Claude reads at the start of every chat in the project. They're where you describe your situation once, so you don't have to explain it again in each new chat.

1. Open the project.
2. Click **Set project instructions**.
3. Type or paste your instructions.
4. Click **Save instructions**.

••• SCREENSHOT 2

the project page with the Set project instructions box open and a few lines of instructions typed in.

What to put in them

Write the instructions the way you'd brief a new colleague who's going to help with this one area of work. Say who the work is for, the tone and format you want, which file is the source of truth, and what Claude should do when it isn't sure.

Keep each instruction to something Claude can act on. "Be professional" gives Claude very little to go on. "Write to customers by first name and keep replies under 150 words" gives it something to follow.

Project instructions or account instructions?

Your account also has instructions that apply to every chat, inside projects and out. Anything true of all your work can live there. Anything that only applies to one area of work belongs in the project, so it doesn't leak into chats where it doesn't fit.

Anthropic doesn't publish a length limit for classic project instructions. Even so, long reference material is better off as a knowledge file.

SECTION 5

Add knowledge files

Knowledge is the set of files every chat in the project can read. It's the right place for anything Claude should check against, rather than anything it should follow as a rule.

1. Open the project. The knowledge area is on the right of the project page.
2. Click **+**.
3. Choose to upload files from your computer, or pick another source from the menu.
4. Select your files.

••• SCREENSHOT 3

the project page with the + menu open in the knowledge area, showing the upload option and the other sources.

Which kinds of files work

Project knowledge takes documents: PDF, Word (DOCX), CSV, plain text (TXT), HTML, ODT, RTF, EPUB, JSON and Excel (XLSX). To upload Excel files, you need **code execution and file creation** turned on in your settings.

Two limits matter:

- **Each file can be up to 30 MB.** That's smaller than the limit for a file you drop into an ordinary chat, so a very large file may need splitting before it goes into a project.
- **Claude reads the text, not the pictures.** Project files are read as text only. The exception is PDFs: for a PDF of 100 pages or fewer, Claude also looks at the charts and images. In a longer PDF, or in a Word file, anything inside an image is lost.

So if a chart in a document matters, put it in a short PDF, or describe what it shows in the text.

Other places files can come from

The **+** menu can also pull in files from connected services.

- **Google Drive.** You can add Google Docs from Drive, and they stay in sync as the documents change. This only works in **private** projects. It's turned off in shared ones.
- **GitHub.** You can add files and folders from a repository and click **Sync** to refresh them. Only one branch comes in. Under the newer one-Claude experience, adding from GitHub isn't supported.
- **Folders on your computer.** In the desktop app, a project can also hold local folders. In a chat, Claude can only read them, while in Cowork it can change the files too. The folders stay on your computer, so the desktop app needs to be open for Claude to reach them.

How much you can add

There's no limit on the number of files. What matters is the total amount of text.

On the Free plan, everything in the project has to fit in Claude's context window, which is how much Claude can hold in mind at once. On Pro, Max, Ultra, Team and Enterprise, once your files get close to that limit, the project switches on its own to a search mode that lets it hold up to around ten times as

much. Claude then looks up the parts of the files that match your question instead of reading everything.

That search works best when each file has a clear name and you mention the file you mean in your question. The Under the Hood guide explains how the search works.

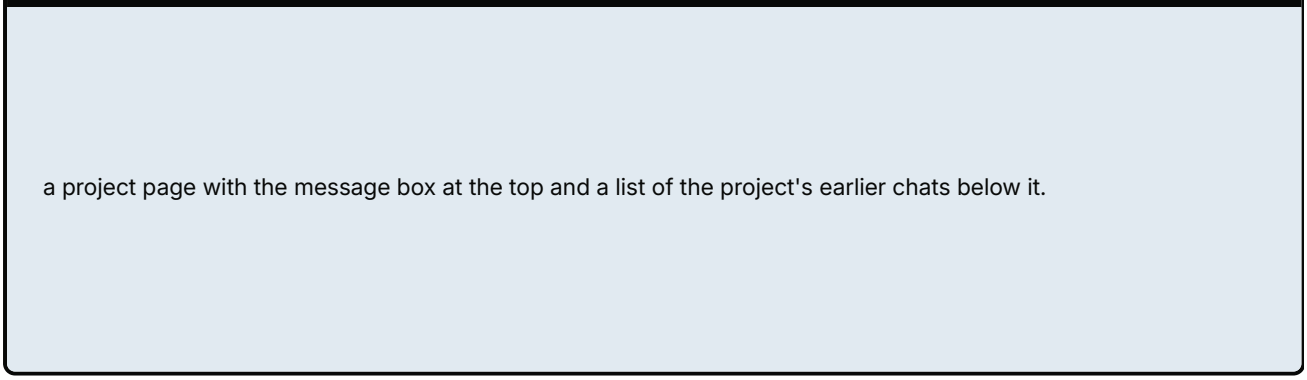
SECTION 6

Start chats inside the project

Once the instructions and files are in, every chat you start from the project page begins with them loaded.

1. Open the project from the sidebar or the Projects page.
2. Type your message in the box on the project page.
3. Send it. The new chat is saved inside the project.

••• SCREENSHOT 4



A good habit is one chat for one piece of work. Keep the follow-ups to a customer's complaint in that chat, and start a new chat in the same project for the next customer. The new chat still gets the instructions, files and memory, without the clutter of the last conversation.

If you finish something in a chat that later chats will need, such as an agreed price change or a new policy, add it to the project's knowledge. That's the only reliable way for another chat in the project to see it.

Projects sync across the desktop app, the web and the mobile app, so you can start a chat on your phone and carry on at your desk.

SECTION 7

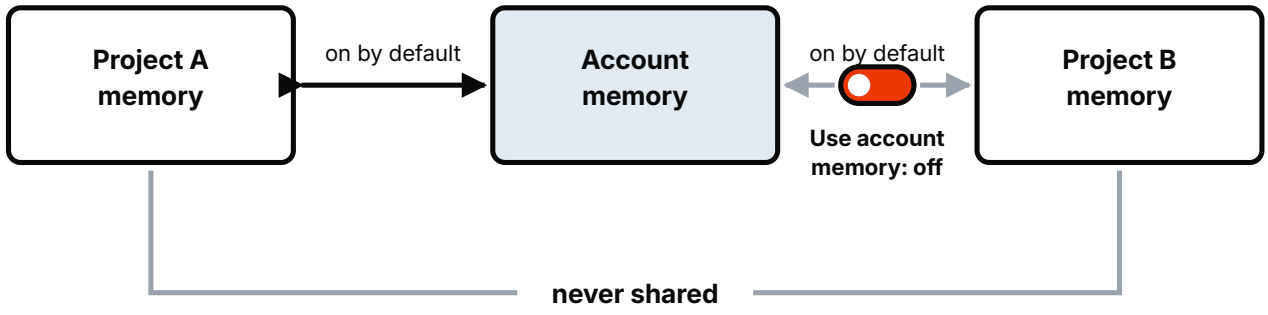
Project memory and the "Use account memory" switch

Each project has its own memory, separate from the instructions and files. Claude saves useful details from your chats to it as you work, such as preferences you've stated or decisions you've made, and reads them back in later chats in the same project.

Memory is on by default on Free, Pro, Max and Ultra, on the web, the desktop app and mobile. On Team and Enterprise, the organisation's owners decide whether it's available.

What Claude can see, and from where

- **Inside a project**, Claude reads that project's memory plus your account memory, which is the memory built up from chats outside any project.
- **It never reads another project's memory.** What Claude learns in your sales project stays out of your HR project.
- **Memory saved in a project can travel outward.** New memory is saved to the project, but if memory is turned on for your account, Claude can also refer to it in chats outside projects.



Closing a project off completely

If a project holds something sensitive, like salary figures or a client under a confidentiality agreement, you can stop its memory mixing with your account memory.

1. Open the project.
2. Find the **Memory** section on the project page.
3. Turn off **Use account memory**.

••• SCREENSHOT 5

the Memory section of a project page with the Use account memory switch turned off.

With that switch off, the project's memory stays fully separate.

Keeping a single chat out of memory

Sometimes you want one chat in a project that leaves no trace. Before you send the first message, open the **+** menu in the message box and turn off **Memory**. That chat then doesn't read the project's memory, and nothing from it is added.

Anthropic doesn't say how often project memory is updated. Project memory also needs memory turned on for your account, so if it isn't working, check that first.

SECTION 8

Put work on a schedule inside a project

In Cowork, a project can have its own scheduled tasks. These run on a timetable you set, such as every Monday morning, and they work with the project's instructions, files and memory. A weekly sales summary is a good fit, because the figures change but the way you want them reported doesn't.

If a project moves into the new combined Claude, its scheduled tasks come with it. Scheduled tasks set up outside any project can read your Cowork memory, but they don't save anything new to it.

••• SCREENSHOT 6

a Cowork project's page with its scheduled tasks listed.

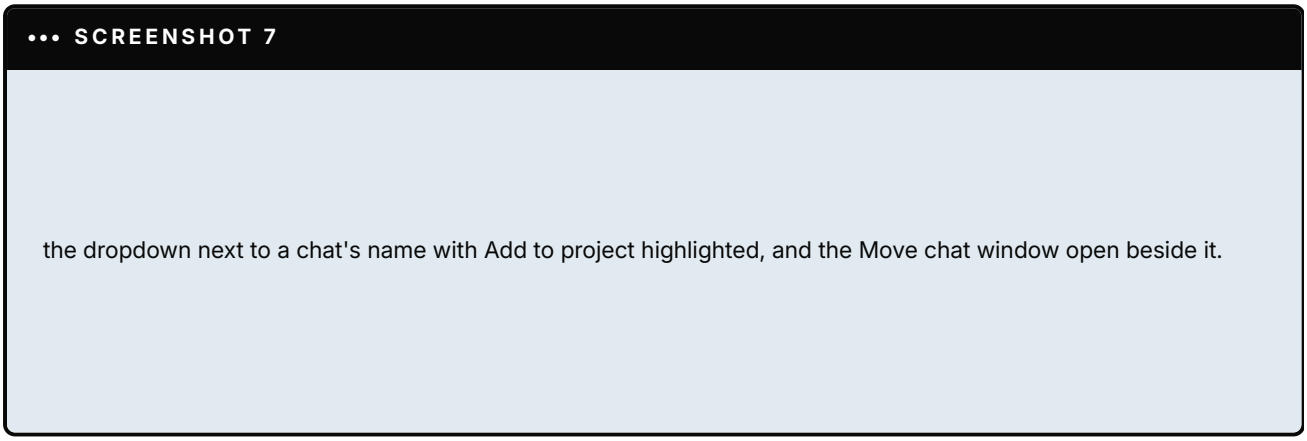
SECTION 9

Move chats in, archive and delete

Moving a chat into a project

If you started a chat outside a project and it turns out to belong in one, you can move it.

1. Open the chat.
2. Click the dropdown arrow next to the chat's name at the top.
3. Choose **Add to project**.
4. In the **Move chat** window, search for or browse to the project, and click it.



The same dropdown inside a project chat lets you take the chat out of the project or move it to a different one.

Archiving a project

When a piece of work is finished but you might need it again, archive the project rather than deleting it.

1. Open the project.
2. Click the three dots in the top right.
3. Choose **Archive** and confirm.

Archiving keeps everything. The chats are still there to read, and the sharing settings and members stay as they were. Archived projects move to the **Archived** tab on the Projects page. To bring one back, open the three dots there and choose **Unarchive**.

Deleting a project

Deleting is permanent, and it can't be undone. Click the three dots on the project, choose **Delete**, then **Yes, delete**.

An archived project can't be deleted straight away. You need to unarchive it first, then delete it.

SECTION 10

Share a project on Team and Enterprise

On Team and Enterprise plans, a project can be shared with colleagues, so everyone works from the same instructions and files. Sharing isn't available on Free, Pro, Max or Ultra.

1. Open the project.
2. Click **Share project**, to the right of the project's name.
3. Add people by name or email, or paste in a list. You can also share with your whole organisation.
4. Choose a permission for them.
5. Click **Share**. Each person gets an email to say the project has been shared with them.

••• SCREENSHOT 8

the Share project window with two colleagues added and the permission dropdown open, showing Can view and Can edit.

The two permission levels

- **Can view.** They can see the project's chats, knowledge and instructions, and start their own chats in it. They can't change anything.
- **Can edit.** They can also change the instructions and knowledge, and manage who else has access. On Enterprise, they can add tags.

A good default is **Can view** for most people, with **Can edit** only for the one or two people who keep the project up to date.

To change someone's access later, open the sharing window and pick a different role. The project's creator can remove someone by clicking their role and choosing **Remove access**.

Finding shared projects

The Projects page has three tabs: **Your projects**, **Organization** and **Shared with you**. Projects other people have shared with you are under the last one.

Sharing settings can't be changed in the mobile app, so do it on the desktop app or the web. And your organisation's owners can turn project sharing off, though projects already shared stay shared.

SECTION 11

Projects on the Code side

Instead of a set of chats, a Code-side Project gives you one conversation with a coordinator. You describe the work, and the coordinator starts threads that do it, several at once, in Anthropic's cloud. The threads keep going after you close your laptop.

Who can get them

Code-side Projects are a public beta on **Pro, Max and Ultra**. They aren't offered on Team or Enterprise yet, and they aren't on the Free plan.

They're also being rolled out gradually. The rollout started with accounts that have run cloud sessions and **don't** already have projects in chat or Cowork. So if you have classic projects, you may get the new ones later than others. If you don't have them yet, you can join the waitlist at claude.com/form/projects.

How to find them

1. Open the **Code** tab in the desktop app, or go to claude.ai/code.
2. Look for **Projects** in the left sidebar.
3. If it isn't there, click **More** and look there.
4. If it isn't under **More** either, the rollout hasn't reached your account yet.

••• SCREENSHOT 9

the Code tab sidebar with the More menu open and Projects listed inside it.

The Get started step

When you open Projects, the button may say **Get started** instead of **New project**. If it does, clicking it shows a list of your existing classic projects from chat and Cowork, and asks you to **upgrade or archive** each one before you carry on.

Anthropic says nothing is lost or deleted in the move. Even so, look through the list before you click, especially for any project shared with colleagues.

Starting one

1. In **Projects**, click **New project**.
2. Give it a **name**. This is the only field you have to fill in.
3. Under **What do you want to work on?**, you can add a one-line goal for Claude to work towards.
4. Under **Context**, you can add GitHub repositories, files, folders or Google Drive folders. Folders are copied in when you add them, so later changes on your computer don't reach the project.
5. Click **Create project**. The project's conversation opens, ready for you to describe the work.

••• SCREENSHOT 10

the New project dialog in the Code tab, with a name, a one-line goal and one repository added under Context.

If the project works on code, the code needs to be on github.com with the Claude GitHub App installed.

Standing rules for every thread go in the project instructions, which you set after the project exists. Click the gear icon in the project header, then go to **Memory**, then **Project instructions**. These can be up to 16,000 characters.

A plain warning about usage

A Code-side Project gets through your plan's limits much faster than a normal chat. Anthropic's own docs say that on a Pro plan you should expect to hit your limit sooner on days you run one. There are a few reasons for that.

- **Every thread is a full session, and several can run at once.** Asking Claude to run fewer is a preference, not a hard cap.

- **New projects run every thread on Opus, the largest model, at high effort.** That's the setting that draws on your plan fastest. Before you send the first piece of work, open **Project settings**, then **General**, and lower the thread model or effort unless the work needs it.
- **Your first project starts working straight away.** As soon as it's created, Claude takes a turn of its own, unless you send a message first, and that turn counts against your plan.
- **Threads pick up again on their own.** When a thread stops at your usage limit, it carries on by default once the limit resets, which spends your next window. You can turn off **Auto-continue when usage limits reset** in **Project settings**, then **General**.
- **Idle threads can wake up.** A thread that opened a pull request on GitHub watches it, and a failed check or a review comment wakes it up again.

To see where your usage went, open **Usage** in **Project settings**. A project with no running threads and nothing to watch doesn't draw on your plan while it sits idle.

AT A GLANCE

Quick reference

••• QUICK REFERENCE

Two kinds of Projects

- Classic project (chat and Cowork): instructions, knowledge files, its own chats and memory. Every plan. Free plan up to 5.
- Code-side Project (Code tab): a coordinator that runs parallel threads in the cloud. Public beta on Pro, Max and Ultra, rolling out gradually.

Classic project click paths

- New project: sidebar, **Projects**, **+ New Project**.
- Instructions: open the project, **Set project instructions**, **Save instructions**.
- Knowledge: **+** in the knowledge area on the right, then choose where the files come from.
- Move a chat in: dropdown next to the chat name, **Add to project**.
- Archive or delete: three dots, top right of the project.
- Share (Team and Enterprise): **Share project**, then **Can view** or **Can edit**.

Things to remember

- Claude can't see the project's name or description.
- Chats in a project don't see each other. Add anything shared to knowledge.
- Project files: up to 30 MB each, read as text. Visuals are read only in PDFs of 100 pages or fewer.
- Google Drive works only in private projects.
- Project memory can reach chats outside projects. Turn off **Use account memory** to keep a project separate.
- One chat out of memory: **+** menu, turn off **Memory**, before the first message.

Code-side Projects

- Find them: Code tab, sidebar, **Projects** or under **More**. Waitlist: claude.com/form/projects.
- **Get started** asks you to upgrade or archive existing classic projects.
- Before the first piece of work: **Project settings**, **General**, check the thread model and effort, and the auto-continue setting.