



CORTEXA ACADEMY · FREE SETUP GUIDE

Claude Cowork, set up **right**.

The initial setup, from install to ready for real work, in about an hour. Step by step for Mac and Windows.
No code required.



Mac & Windows

Copy-paste templates

Edition 2026.8.1

hello@cortexa-consulting.ai · www.cortexa-consulting.ai · The interactive version of this guide, with one-click copy buttons, lives at www.cortexa-consulting.ai/cortexa-claude-cowork-setup-guide.html

From install to ready.

Claude Cowork is where Claude stops telling you how and starts doing the work: reading real files, writing real documents, finishing multi-step jobs while you do something else. This guide covers the initial setup, from a fresh install to an account that knows you and your work. Plan for about an hour.

WHAT YOU'LL HAVE BY THE END

- ✓ Claude Cowork installed and configured on your Mac or Windows PC
- ✓ Global instructions that make Claude work the way you work
- ✓ An about-me memory system Claude reads at the start of every session
- ✓ Connected tools: Gmail, Calendar, Drive and more
- ✓ The essential skills switched on, and a folder structure that scales
- ✓ One official plugin installed and briefed on your business
- ✓ Guardrails set, so Claude proposes and you approve

WHAT YOU NEED

REQUIREMENT	DETAIL
A paid Claude plan	Pro or higher. Cowork is not included on the free plan.
A computer	Mac (macOS 11 or later) or Windows PC (Windows 10 or later, x64).
About an hour	No code, no terminal. If you can install an app and type a sentence, you can do this.

① ON A TEAM OR ENTERPRISE PLAN?

Cowork is switched on for the whole organization by an admin, so if you don't see it, that's the first thing to check. Enterprise admins can also enable it for specific groups only. Everything else in this guide works the same once it's on.

One mindset shift before you start. Treat Claude less like a tool and more like a capable colleague who uses your tools: files, inbox, calendar. The setup below is what you'd give any new team member: context on who you are, rules for how you work, and access to what they need. Nothing more.

★ HOW TO USE THIS GUIDE

Work through the steps in order; each tab is one step. Every template and prompt has a **Copy** button: copy, paste into Claude, done. Where a template has {PLACEHOLDERS}, fill in what you can; Claude asks for anything you leave blank. Prefer paper? There's a PDF of this whole guide linked at the top.

This is the setup hour. Putting the setup to work (your first agent, scheduled tasks, real spreadsheets and decks) is what our hands-on course, **Claude Cowork Essentials**, covers; the last tab tells you how to go further. And if you'd like the broader orientation first, our free **Getting Started with Claude** guide covers the whole landscape: the web app, prompting, and where Cowork fits.

Set up your workspace.

Install the app, pick a plan, meet the three modes, and give Claude one folder to work in.

1.1 · GET THE APP

No Claude account yet? Create one free at `claude.ai` first; the plan comes in 1.2. Cowork also runs on the web there with nothing to install; it's a fine way to try it. Install the desktop app for the full setup in this guide: it's what lets Claude work in folders on your computer.

MACOS

1

Download Go to `claude.com/download` and choose the macOS build. One universal app covers Apple Silicon and Intel; it needs macOS 11 (Big Sur) or later.

2

Install Open the downloaded `.dmg` and drag **Claude** into **Applications**.

3

Sign in Launch Claude from Applications and sign in with your Claude account.

WINDOWS

1

Download Go to `claude.com/download` and choose the Windows build. It needs Windows 10 or later on an x64 (Intel/AMD) machine. As of this edition, ARM64 PCs (Snapdragon-based Surfaces and similar) don't run Cowork.

2

Install Run the downloaded installer. Use an account with **administrator rights**: a non-admin install runs Chat, but Cowork on the desktop won't be available.

3

Sign in Launch Claude from the Start menu and sign in with your Claude account.

! WINDOWS ONLY: ENABLE VIRTUAL MACHINE PLATFORM

Cowork on Windows needs one system feature that's often off. Press **Start**, type `Windows features`, open **Turn Windows features on or off**, tick **Virtual Machine Platform**, click OK, and restart when Windows asks. (The same dialog opens by running `OptionalFeatures.exe`.) Macs need no equivalent step.

1.2 · CHOOSE YOUR PLAN

PLAN	PRICE	COWORK?	BEST FOR
Free	\$0	Not included	Trying Claude chat
Pro RECOMMENDED	\$20/mo (\$17/mo billed yearly)	Included	Almost everyone; every step in this guide works on Pro
Max 5x / 20x	\$100 / \$200 per month	Included, more headroom	Running Cowork or Claude Code all day
Team / Enterprise	\$25 Standard · \$125 Premium per seat	Admin switches it on org-wide	Teams that want one bill, shared settings and admin controls

① START WITH PRO

Upgrade only if you repeatedly hit usage limits, which happens fastest when you lean on Cowork daily. On Team plans, note that **Premium seats** carry the Cowork-scale usage.

1.3 · OPEN COWORK

At the top of the app you'll see three modes: **Chat**, **Cowork** and **Code**. Chat is the familiar conversation. Code is for developers. Click **Cowork**. That's home for the rest of this guide.

1.4 · CREATE YOUR WORKSPACE FOLDER

- 1 Make the folder** In your **Documents** folder, create a new folder called `Claude Cowork`. The same path works on Mac and Windows.
- 2 Connect it** When Cowork asks which folder to work in, choose it and click **Allow**. If it doesn't ask, open Cowork's settings and add the folder there.

Treat this folder as the desk you share with Claude. Everything you want Claude to reach goes inside; everything you don't, stays outside. That one habit does more for safety than any setting.

① WHERE THE WORK RUNS

Cowork sessions run in Anthropic's cloud, so work keeps going if you close the laptop. Your **local folders** are the exception: Claude can only reach them while the desktop app is open and connected. Close the app and cloud work continues; local file access pauses until you're back.

1.5 · PICK YOUR MODEL

Click the model selector. **Sonnet** (the default) is the right choice for daily work; switch to **Opus** for genuinely complex, multi-step projects. If you see an extended thinking toggle by the model selector, turn it on: Cowork benefits from the extra reasoning room.

★ MODEL LINEUPS SHIFT FAST

As of this edition the everyday lineup is Sonnet 5, Opus 5 and Haiku 4.5, and your menu may list more — what you see in your own account is always the source of truth. The top of the range is **Fable 5**: reach for it the way you'd reach for Opus, on the work that matters most. It comes standard on Max and Team premium seats; on Pro it runs on pay-as-you-go usage credits rather than the subscription.

Write your global instructions.

Ten minutes here improves every session after it. Global instructions are the standing brief Claude reads before anything else: who you are, how to work with you, and where the lines are.

- 1 Copy the brief into a chat** Copy the Cortexa starting brief below and paste it into a **new chat**. Claude asks for each {PLACEHOLDER} you haven't filled, then hands back the finished brief.
- 2 Answer in plain language** Skip anything that doesn't fit how you work and Claude drops the line. Copy the completed brief it returns.
- 3 Open global instructions** Click your name or initials (bottom-left), choose **Settings**, open the **Cowork** section and find **Global instructions**. Click **Edit**.
- 4 Save** Paste the finished brief into the window and click **Save**.

> _ THE CORTEXA STARTING BRIEF

[COPY / TYPE](#)

You're helping me finish my Claude Cowork global instructions. Below is my starting brief. Ask me for each {PLACEHOLDER} that is still unfilled, a couple at a time, in plain language. If I say a line doesn't fit, drop it. When everything is answered, give me the finished brief as one copyable block, no placeholders and no commentary, ready to paste into Settings → Cowork → Global instructions.

Who you're working with

My name is {FULL NAME}; call me {PREFERRED NAME}.

Role: {JOB TITLE} at {COMPANY OR TEAM}.

In one sentence, my work: {WHAT YOU DO AND FOR WHOM}.

The people my work serves: {CLIENTS OR AUDIENCE — who they are and what they count on you for}.

My priorities right now:

- {PRIORITY 1 — name the outcome, not the task}
- {PRIORITY 2}
- {PRIORITY 3}

How to work with me

- Answer first, context after. Don't repeat my question back to me.
- Plain language. If a term needs explaining, choose a plainer term.
- Give me the one thing I asked for. Offer extras in a single line, not as a second deliverable.
- If my request is vague, ask one clarifying question, then commit to your best reading of it.
- Default to prose in conversation. Save headers, bullets and tables for when the content genuinely needs them.
- Preferred format for written work: {MARKDOWN / PLAIN TEXT / DOC}.
- Unless I say otherwise, write for {WHO USUALLY READS YOUR WORK}.

Candor

- Tell me what's real. If a plan has a flaw, say so before I act on it, not after.
- Disagree when you have a reason. I'd rather be corrected than flattered.
- Skip compliments about my questions or ideas; grade the ideas instead. Strong, workable or weak, and why.
- When you present options, rank them and name your pick.
- Separate fact from estimate. Label your guesses and say what would confirm them.
- If something won't work, lead with that, then offer the closest thing that would.

Guardrails

- Confirm with me before anything hard to undo: sending, publishing, deleting, sharing outside this workspace, or spending money.
- Anything outbound (email, messages, posts) stays a draft until I send it myself.
- Client material is confidential. Never carry one client's files, data or voice into another client's work.
- Client-facing work gets my review before it ships. No exceptions.
- Cite real sources or say you don't have one. Never invent references, numbers or quotes.
- On legal, medical or financial questions, give me your read, then flag what a professional should confirm.

When in doubt

1. Candid beats comfortable.
2. Plain beats polished.
3. Short beats long, unless I asked for depth.
4. Ask once, then act.
5. Finish the work before describing the work.

★ SET IT, THEN LEAVE IT

Once these are solid you won't touch them for months. Day-to-day context (projects, preferences, progress) belongs in the about-me files you'll build in Step 3, not here.

Build your about-me memory system.

Cowork starts each session fresh: it has no memory of the last one unless you give it somewhere to keep notes. Three small files fix that, and they're what separates a set-up Cowork from a blank one.

THE THREE FILES

FILE	PURPOSE
about-me.md	Who you are, your business, projects and audience: day-one context for a new team member
writing-rules.md	How you want Claude to write, including what to avoid so it doesn't sound like AI
memory.md	A running log Claude updates as you work, so projects pick up where they left off

You don't write these by hand. Paste the prompt below into a new Cowork session and let Claude interview you and build all three.

> _ BUILD THE MEMORY SYSTEM

COPY / TYPE

Create an "about-me" folder in this workspace with three files you'll read at the start of every session:

1. about-me.md — my name, role, business, the tools I use, the people my work serves, and my current projects. Write it as the briefing you'd want on day one of a new job.

2. writing-rules.md — rules for writing as me. Start from Wikipedia's "Signs of AI writing" guide and distill it into a short list of what to avoid, plus anything you notice about how I write.

3. memory.md — a running project log. Append new entries at the bottom, update old ones in place, and keep a short list of open loops so nothing drops between sessions.

Interview me for whatever you're missing, then build all three. When you're done, draft an updated global-instructions block that has you read these files at the start of every session, so I can paste it into my Settings.

- 1

Answer its questions Claude will ask about your work before writing. The more specific your answers, the better every future session gets.
- 2

Update your settings Paste the instructions block Claude drafts into Settings → Cowork → Global instructions, exactly as in Step 2.

> _ **VERIFY IT WORKS**

COPY / TYPE

Before we start anything: how are you set up to work with me?

If the answer mentions your three files, the system is live. Every session from now on starts already knowing you.

Connect your tools.

Connectors are what turn Claude from a smart assistant into a colleague inside your actual workspace: your inbox, your calendar, your documents.

4.1 · ADD YOUR CONNECTORS

Open **Customize** in the left sidebar (it gathers connectors, skills and plugins in one place) and add connectors in this order:

PRIORITY	CONNECTORS	WHY
Essential	Gmail · Google Calendar · Google Drive	Inbox, schedule and documents are where Cowork pays for itself first
Recommended	Notion · Slack	If your notes or your team live there, Claude should be able to look things up. Local-file note apps (Obsidian, Logseq) need no connector; see 4.5
Later	Anything else in your stack	Add tools when a real workflow needs them, not before

! CONNECT THE MINIMUM

Every connector widens what Claude can see and do, so start with what this guide's setup uses. Adding a connector later takes thirty seconds; unwinding an over-connected setup takes longer.

4.2 · DECIDE ON THE TRAINING SETTING

In **Settings → Privacy**, review the **Help improve Claude** option. Left on, your sessions can be used to improve Anthropic's models; switched off, they aren't. It ships switched on for Pro, Max and Team accounts (Enterprise is the exception), so set it deliberately, the way you and, if relevant, your clients would expect.

4.3 · TEST THE CONNECTION

>_ CONNECTOR CHECK

Quick connector check: look at tomorrow on my calendar and at today's unread email, and tell me the three things that matter most. Flag anything you couldn't reach.

COPY / TYPE

4.4 · SET THE DRAFT-ONLY EMAIL RULE

Before Claude touches your inbox in earnest, set one standing rule: it drafts, you send.

> _ DRAFT-ONLY RULE

[COPY / TYPE](#)

Standing rule for email: anything you write goes to my Drafts folder for review. You never send. Record this in `memory.md` so it holds in every future session.

4.5 · MAP YOUR WORKSPACE (IF YOUR NOTES LIVE ELSEWHERE)

If your working knowledge lives in a big space (a Notion workspace, an Obsidian vault, a deep Google Drive or SharePoint), a one-off map saves Claude from searching the whole thing every time it needs one folder. It's ten minutes that pays back on every lookup after it.

A note for Obsidian, Logseq and similar local-file note apps: they need no connector at all. Your vault is an ordinary folder of Markdown files, so connect it the same way you connected the workspace folder in Step 1, and Claude can read it directly.

> _ WORKSPACE MAP

[COPY / TYPE](#)

Go through my {NOTION WORKSPACE / OBSIDIAN VAULT / GOOGLE DRIVE / OTHER} and build a map of it: the key databases or folders, the active projects, and where reference material lives. If I left that placeholder unfilled, ask me where my notes live before you start. Save the map as `my-workspace-map.md` in the `about-me` folder, and note in `memory.md` to check the map before searching from scratch.

4.6 · OPTIONAL: CLAUDE IN YOUR BROWSER

The **Claude in Chrome** extension lets Claude browse sites, fill forms and click through workflows in your own browser. It's genuinely useful and genuinely powerful, which is exactly why we suggest adding it after the basics feel comfortable, not on day one.

Switch on **skills** and shape the workspace.

Skills are packaged abilities: producing a formatted Word document, a working spreadsheet, a slide deck. Setup here means switching on the right ones and giving the workspace a structure that scales. Learning to build your own is course material, not setup.

5.1 · ENABLE THE ESSENTIALS

- 1 Open the directory** Go to **Customize** in the left sidebar, open the **Skills** tab and click +.
- 2 Check Skill Creator** Make sure **Skill Creator** is on (it often ships enabled). It's the skill that helps Claude build other skills, and the course leans on it heavily later.
- 3 Add what you'll use** Enable the document, spreadsheet and presentation skills that match your actual work. Skip the rest; adding one later takes seconds.

5.2 · BUILD THE FOLDER STRUCTURE

>_ FOLDER STRUCTURE PROMPT

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Set up the rest of this workspace:

1. A "projects" folder. Each active project gets its own subfolder containing a `brief.md` (what the project is and what done looks like) and its own `memory.md`.

2. An "outputs" folder. Everything you produce lands here, in a subfolder per project, so I always know where finished work is.

The about-me folder stays as it is. If I bring you something new and you're not sure whether it's a project, ask. Then record this structure in `memory.md` so it holds.

> _ WHAT YOU END UP WITH

COPY / TYPE

```
Claude Cowork/  
├─ about-me/  
│   ├── about-me.md  
│   ├── writing-rules.md  
│   ├── memory.md  
│   └─ my-workspace-map.md  
├─ projects/  
│   └─ [project-name]/  
│       ├── brief.md  
│       └─ memory.md  
└─ outputs/  
    └─ [project-name]/  
        └─ [finished work]
```

The shape matters more than the names: context in one place, live projects in another, finished work in a third. Claude keeps it tidy because the memory file now tells it to.

One plugin, and a look ahead.

Two last pieces round out the setup: install a single official plugin so Claude has a specialist on call, and get the lay of the land on scheduled tasks before the course puts them to work.

6.1 · INSTALL ONE OFFICIAL PLUGIN

If a skill is a tool in Claude's toolbox, a plugin is a specialist who arrives with their own toolbox: methods, checklists and knowledge for a whole domain. One is plenty for now, and Anthropic's own are the safe pick.

- 1 Browse the directory** Go to **Customize**, open the **Plugins** tab and look at what's available.
- 2 Pick the official one that fits Claude for Small Business** covers finance, sales and marketing workflows; the **Claude for Legal** practice-area plugins cover contract triage and meeting prep. Choose whichever maps to your actual role.
- 3 Brief it** A specialist who knows your business beats a generic one. Paste the prompt below into a new session after installing.

> _ PLUGIN BRIEFING

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You now have the {PLUGIN NAME} plugin. (If that placeholder is still unfilled, ask me which plugin I installed first.) Read my about-me files, then tell me: which three of its workflows would help my work most, and what would you need from me to run the first one? Record the answer in memory.md.

6.2 · SCHEDULED TASKS, AT A GLANCE

Scheduled tasks are the same idea as everything above, on a cadence: one standing brief that runs daily or weekly without being asked twice. They run in Anthropic's cloud, so a closed laptop doesn't stop them; only tasks that need your local folders wait for the desktop app to be open. When you're ready, typing `/schedule` in Cowork starts one, on any paid plan.

① WHY WE STOP HERE

A schedule is only as good as the brief behind it, and building that brief (your first agent, tested, then put on a cadence) is the centerpiece of **Claude Cowork Essentials**. Setup done today; the build is the course.

Should you really let AI touch your stuff?

Fair question, and the honest answer is: only with the guardrails on. The good news is you just built most of them. Claude proposes; you approve.

YOUR SAFETY NET, LAYER BY LAYER

- 1 Folder scope** Claude reaches only the folders you've connected. The shared-desk habit from Step 1 is the foundation everything else stands on.
- 2 Standing rules** Your starting brief requires confirmation before anything hard to reverse: sending, publishing, deleting, spending.
- 3 Draft-only email** Messages land in your drafts folder, never in someone's inbox, until you hit send yourself.
- 4 The training setting** You decided in Step 4 whether sessions may be used to improve Anthropic's models — deliberately, not by default.
- 5 Connector permissions** Each connector has its own controls, and you connected the minimum. What isn't connected can't be read.
- 6 Computer-use lists** If you later enable computer use, the allow and deny lists decide which apps Claude may operate. Deny anything you'd hesitate to hand a contractor.

! CLAUDE CAN STILL GET THINGS WRONG

Guardrails limit the blast radius; they don't make the work perfect. Start with small, reversible jobs (organize a folder, draft a document) and watch the progress panel while trust builds. Review anything client-facing before it ships, the same as you would with a new hire.

Working with regulated or genuinely sensitive data? That's a conversation with your compliance team before it's a Cowork task. As of this edition, Anthropic's Enterprise audit logs don't yet capture Cowork activity, so ask your admin what's recorded before assuming the trail exists.

The checklist, and where to go next.

Copy the checklist into your task manager and tick through it. If every box is checked, your setup is done.

> _ SETUP CHECKLIST

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```
# Claude Cowork setup checklist

## Step 1 – Workspace
- [ ] Claude Desktop installed (Mac: drag to Applications · Windows: run installer as admin)
- [ ] Windows only: Virtual Machine Platform enabled, then restarted
- [ ] Paid plan active (Pro or higher – Cowork isn't on Free)
- [ ] Workspace folder created and connected (Documents/Claude Cowork)
- [ ] Model picked (Sonnet daily · Opus for complex work)

## Step 2 – Global instructions
- [ ] Starting brief filled in and saved in Settings

## Step 3 – About-me memory system
- [ ] about-me.md created
- [ ] writing-rules.md created
- [ ] memory.md created
- [ ] Global instructions reference all three files

## Step 4 – Connectors
- [ ] Gmail connected, draft-only rule recorded
- [ ] Calendar connected
- [ ] Drive connected
- [ ] Workspace map built (if your notes live in Notion, Obsidian, Drive or similar)
- [ ] Training setting reviewed (Settings → Privacy)
- [ ] Claude in Chrome installed (optional, later)

## Step 5 – Skills & folders
- [ ] Skill Creator on, plus the document/spreadsheet/deck skills you'll use
- [ ] Folder structure built (about-me / projects / outputs)

## Step 6 – Extras
- [ ] One official plugin installed and briefed
- [ ] Read the scheduled-tasks overview (the build itself comes with the course)
```

SIX HABITS THAT COMPOUND

- ✓ Dictate long prompts instead of typing them: built-in dictation on the Mac, **Win+H** on Windows, or a tool like Wispr Flow.
- ✓ Once your starting brief is solid, leave it alone. Day-to-day changes belong in the about-me files.

- ✓ A workspace map saves time and tokens: Claude finds things instead of searching for them.
- ✓ When you discover a better workflow, tell Claude to record it in memory.md. That's how the setup keeps getting better.
- ✓ Watch the progress panel on early runs. You'll learn how Claude thinks, and catch wrong turns while they're cheap.
- ✓ Sonnet for daily work, Opus for ambitious work. Matching the model to the task stretches a Pro plan a long way.

Specific in, specific out. The quality of everything above tracks the quality of your about-me files: vague context produces vague work, from AI and from colleagues alike. If writing the first ask is the hard part, our free [Prompt Generator](#) matches you three ready-to-run Claude workflows in about two minutes.

GO FURTHER: CLAUDE COWORK ESSENTIALS

This guide ends where the interesting part begins. Your account now knows you, reaches your tools and keeps its memory; what it hasn't done yet is real work. That's the ground **Claude Cowork Essentials** covers: Cortexa Academy's hands-on course where you build your first agent, put jobs on a schedule that runs while you sleep, and turn real files into spreadsheets, decks and dashboards, with the patterns worth stealing along the way.

Intelligence, applied.

① BRING YOUR TEAM

Cowork Essentials runs as a live, hands-on workshop, tailored to your stack and your policies. Ask us at hello@cortexa-consulting.ai, or preview the course page at www.cortexa-consulting.ai/academy (workshop clients receive an access code).



INTELLIGENCE, **APPLIED.**

Set up. Now put it to **work.**

Your account now knows you, reaches your tools and keeps its memory. The hands-on part comes next: **Claude Cowork Essentials** is Cortexa Academy's live workshop where you build your first agent, schedule real jobs and ship real files. Ask us, or preview the course at www.cortexa-consulting.ai/academy.

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