AI TOOLS FOR RESEARCHERS

Practical Guide to Claude Projects & Skills

Create persistent AI workspaces and teach Claude your personal research style

Prepared by **Dr. Zaid Al-Huda** • Ramadan Scientific Evening

PART 1 - CLAUDE PROJECTS

What Is a Claude Project?

Claude Projects are persistent AI workspaces where Claude remembers your context, instructions, and uploaded documents across every conversation you start within the project. Unlike a regular chat, which starts fresh every time, a Project keeps your rules, your materials, and your preferences permanently active.

The key difference

Without a Project: Every new chat starts from zero. You must re-explain your topic, your papers, your writing style, and your formatting rules every single session.

With a Project: Claude already knows your context, has read your documents, and follows your custom rules - automatically, from the very first message in every session.

What a Project Contains

Component	What it does
Project Name	A short label to identify the project in your sidebar
Project Description	A brief summary of purpose - helps when you have multiple projects
Custom Instructions	Permanent rules Claude follows every session: your role, your documents, your writing standards, and your limits
Uploaded Files	Your papers, templates, references - Claude reads these in every conversation

Before You Begin - Prepare Your Files

Before creating your project, gather the documents you will upload. A well-prepared project produces significantly better results.

Three types of files to collect

1. **Your own research documents**

   Published papers, working papers, conference papers, data summaries, or any document containing your original research. These are the primary content source - Claude draws all facts, findings, and contributions exclusively from what you provide here.

2. **Background and reference literature**

Review papers, systematic reviews, surveys, or key papers from your field that map the current state of knowledge. Claude uses these to situate your work within the broader literature and to provide context when writing reviews or discussions.

3. **Your formatting and style guide**

   A thesis template, journal submission guidelines, conference formatting requirements, or an institutional style guide. Whatever document governs how your output should be structured and formatted, Claude treats it as a binding rule.

File upload notes

- PDF format works best for all papers.
- You can upload up to 20 files per project (as of early 2026).
- Each file can be up to 32 MB.
- Files can be added, removed, or replaced at any time.

Step 1 - Create a New Claude Project

Open Claude.ai in your browser and sign in. In the left-hand sidebar, find the Projects section and click New Project or the + icon next to it.

1. **Open claude.ai and sign in to your account.**
   Projects are available on all plans, including the free tier (up to 5 projects). Paid plans (Pro, Team, or Max) unlock enhanced capabilities such as larger knowledge bases and team collaboration features.
2. **In the left sidebar, find the Projects section.**
   It appears below your recent chats. If you do not see it, click “New Project” at the top of the sidebar.
3. Click "**New Project**" or "**Create Project**" in the left sidebar.

A setup page opens with the following fields:

- **Name** - A label for your project (appears in the sidebar for easy access).
- **Description** - A brief summary of the project's purpose (for your reference only; it does not affect Claude's behavior).

4. **A new project workspace will open.**
   You will configure the instructions in the next steps.
   - **Instructions** - The custom prompt that guides Claude's behavior across all conversations in this project (e.g., tone, format, role).

Step 2 - Name Your Project

The project name is the label visible in your sidebar. Keep it short, specific, and professional.

Example Project Name

The example below is for a PhD student writing a thesis on medical imaging. Replace the project type and topic with your own research context.

```
PhD Thesis — Skin Lesion Segmentation & Anomaly Detection  ← EXAMPLE
```

Naming formula — adapt to your own project type and topic

Use this pattern: `[Project Type] - [Your Research Topic in 3–5 Words]`

Examples across different research contexts:

- PhD Thesis - Arabic Sentiment Analysis NLP
- Journal Paper - GLP-1 Receptor Agonists T2DM
- Systematic Review - AI in Diagnostic Radiology
- Grant Proposal - Climate Impacts on Crop Yield
- Conference Paper - Federated Learning Privacy Methods

Step 3 - Write Your Project Description

A 2–3 sentence summary that tells Claude what this project does, what materials it works with, and what the goal is.

Example Project Description

This example is for a PhD thesis project on medical imaging. The structure works for any research project - just replace the topic and document types with your own.

```
This project supports the writing of a complete PhD thesis on skin lesion
segmentation and unsupervised anomaly detection using deep learning. ←
EXAMPLE
Claude works exclusively with my uploaded research papers and reference
literature as the primary source of content and evidence. The formatting
template, once uploaded, governs all structural and layout decisions.
```

Adapt It for Your Own Project

```
This project supports [writing a thesis / reviewing papers / preparing a
grant]
on [your research topic]. Claude works exclusively with my uploaded [list
your
document types] as the primary source of content. The [template / style
guide],
once uploaded, governs all formatting decisions.
```

Step 4 - Paste Your Custom Instructions

Custom instructions are the most important part. These are the permanent rules Claude follows in every conversation inside this project. Paste them into the Project Instructions field.

Where to find the instructions field

Inside your project, click the pencil icon or “Project Settings”. The custom instructions field will appear. There is a limit of approximately 6,000 characters — the instructions below fit within that limit.

Ready-to-Use Project Instructions

Copy and paste everything in the box below exactly as written:

```
ROLE & IDENTITY
You are an expert academic writing assistant and PhD thesis advisor. Your primary
role is to support me in writing a complete, high-quality PhD thesis from start
to
finish. You combine deep academic expertise with meticulous attention to
structure,
logic, and scholarly writing standards.

DOCUMENT STRUCTURE
Once I upload my university's official thesis template, treat it as the binding
structure for all formatting, layout, and chapter organization. Always follow
the
template's heading hierarchy, margin specifications, font requirements, citation
format, and any other rules it defines. If I have not yet uploaded the template,
ask me to do so before drafting any structured content.

SOURCE MATERIALS & THEIR ROLES
I will upload three types of documents. Each has a distinct purpose:
1. My Published and Working Papers: PRIMARY source of content, findings, data,
   and contributions. All claims must be grounded in these papers only.
2. Recent Review Papers: Use to situate my work within the current literature.
   Draw on them for the Literature Review and to contextualize the Discussion.
3. University Thesis Template: Governs all structural and formatting decisions.

CHAPTER WRITING GUIDELINES
You are authorized to help me write, revise, and refine the following chapters:
- Introduction: Context, research gap, objectives, and thesis structure.
- Literature Review: Synthesize review papers; identify themes and gaps.
- Methodology: Research design, data collection, analysis as in my papers.
- Results: Present findings accurately. Do not interpret here.
- Discussion: Interpret results in light of the literature.
- Conclusion: Summarize contributions, state limitations, suggest future work.

ACADEMIC TONE & CITATION INTEGRITY
Maintain a consistent formal academic tone throughout. Apply the citation style
in the template rigorously. Never fabricate references, citations, author names,
journal names, publication years, or any factual claims. Only use what is in my
uploaded materials.

HANDLING MISSING CONTEXT
If required information is not present in uploaded materials, do not guess or
fill
gaps. Pause and ask specific clarifying questions before proceeding.
```

```
THESIS COHERENCE & ARGUMENT TRACKING
Keep track of the overarching thesis argument across all chapters. Ensure the
Introduction's research questions are answered in the Results and Discussion,
and that the Conclusion accurately reflects what was presented.

WHAT YOU MUST NEVER DO
- Do not add references not found in my uploaded materials.
- Do not fabricate data, statistics, findings, or author names.
- Do not deviate from the thesis template structure.
- Do not summarize content you have not been given - ask instead.
```

What each section of the instructions does

ROLE & IDENTITY: Claude adopts the role of an expert advisor who understands academic writing deeply.

DOCUMENT STRUCTURE: The thesis template is treated as law. Claude will not deviate from your university's requirements.

SOURCE MATERIALS: Your papers are the content source. Review papers provide context only. Roles never overlap.

CHAPTER GUIDANCE: Claude knows what belongs in each chapter and what to avoid in each one.

CITATION INTEGRITY: Claude will never fabricate a reference or finding. It asks clarifying questions if information is missing.

COHERENCE TRACKING: Claude maintains consistency across chapters so the argument holds from Introduction to Conclusion.

Step 5 - Upload Your Files to the Project

After saving your settings, upload your documents. This is what gives Claude the actual content it will work with.

1. **Click "Add Files" or the upload icon inside your project.**
   Locate the file upload area on the project page.
2. **Select your files from your computer.**
   Hold Ctrl (Windows) or Cmd (Mac) to select multiple files at once.
3. **Wait for all files to finish uploading.**
   Each file shows a checkmark when ready. Do not close the page during upload.
4. **Verify all three file categories are present.**
   Your research documents, reference literature, and formatting template should all appear in the file list.

Recommended file naming

Label your files clearly so Claude can reference them by name. Use a consistent format:

Your research documents:

- MyPaper_1_[ShortTitle]_[Year].pdf
- MyPaper_2_[ShortTitle]_[Year].pdf

Background and reference literature:

- Review_[Topic]_[Year].pdf
- Survey_[Topic]_[Year].pdf

Formatting template or style guide:

- Template_[Journal_or_Institution]_Official.docx

Step 6 - Start Your First Conversation

Your project is ready. Every conversation started inside this project will automatically have your instructions and documents available. You never need to re-brief Claude.

Example Opening Prompts

Prompt 1: Start writing a section of your document

```
I am ready to start writing [section name, e.g. Introduction / Literature Review / Methodology]. Based on my uploaded research documents, draft a first version. Follow the structure defined in the formatting template I uploaded.
```

Prompt 2: Request a structured outline before writing

```
Before drafting, give me a proposed outline for [section name]. Base it on the themes covered in my uploaded reference literature and how they relate to my own research. Show the main sections and what each will cover.
```

Prompt 3: Write from your own research documents only

```
Draft [section name] based entirely on what is documented in my uploaded research papers. Do not draw from the review literature for this section - only use my own findings and methodology as the source.
```

Prompt 4: Check consistency across what you have written

```
I have drafted [Section A] and [Section B]. Read both and tell me whether the arguments, findings, and terminology are consistent between them. Flag any contradictions or gaps in logic.
```

The golden rule: be specific

A vague request gets a generic answer. A specific request gets exactly what you need.

❌ **Vague:** “Write my Literature Review.” ← No section specified, no source indicated, no constraints given.

☑ **Specific:** “Draft Section 2.1 on [specific theme]. Draw from the review papers I uploaded and show how my contribution in MyPaper_1 advances prior work in this area.”

Situation	What to say to Claude
Response misses the point	"The response is too general. Focus on [specific aspect] as described in MyPaper_1, not a broad overview."
You want a different tone	"Rewrite in a formal, third-person academic style. Avoid passive voice where possible."
Claude adds unknown reference	"Where in my uploaded papers does this reference appear? If it is not there, remove it."
Revising a specific section	"Revise this paragraph for clarity and flow. Keep all factual content exactly as written."
Starting a new chapter	"We are now starting Chapter 3. Here is what Chapter 2 covered: [brief summary]. Draft Chapter 3 with that context in mind."

PART 2 - CLAUDE SKILLS

What Is a Claude Skill?

A Claude Skill is a reusable, uploadable set of instructions that teaches Claude how to handle a specific type of task - following your personal style, format, and approach. Unlike Project instructions (which stay active across all conversations in one project), a Skill is a portable template you can upload into any Project or conversation to activate a specific behaviour instantly.

Skills vs. Projects - the key difference

A Project is a persistent workspace for an ongoing body of work - like writing a thesis or managing a research pipeline. It remembers your documents and rules across many conversations.

A Skill is a reusable behavioural template for a specific type of task - like responding to reviewers, writing abstracts, or reformatting references. You activate a Skill by uploading it when you need that specific behaviour. One Skill can be used across multiple Projects.

Feature	Project vs. Skill
Purpose	Project: ongoing workspace for a big body of work. Skill: reusable template for a recurring specific task
Scope	Project: one project, many conversations. Skill: can be used across any project or chat
Activation	Project: always active inside that project. Skill: activated by uploading the skill file when needed
Content	Project: your documents, rules, formatting standards. Skill: instructions that encode a specific task pattern
Best used for	Project: thesis writing, grant writing, paper review. Skill: reviewer responses, abstract writing, reference formatting

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Practical Example: Peer Review Response Skill

This is a complete, ready-to-build example of a Claude Skill designed specifically for researchers. It teaches Claude how to respond to peer reviewer comments in your personal style, tone, and structure - based on examples you have already written.

What this Skill does

- You upload an example file of responses you have written to reviewers in the past.
- Claude analyses that file to understand your personal style, structure, and tone.
- In any future conversation, you paste the reviewer comments and Claude responds using your exact style.
- You never have to re-explain your format or preferences - the Skill remembers them.

Skill Step 1 - Prepare Your Example File

The example file is the foundation of this Skill. Claude will study it to learn your style. The better the example, the better the Skill will perform.

What to include in your example file

1. **At least 2–3 complete response letters you have written before.**
   Choose letters that represent your best, most polished work. Include responses to both major and minor comments.
2. **Use real responses from actual submissions.**
   Do not create artificial examples. Real responses teach Claude the nuances of how you handle difficult or critical comments.
3. **Include a variety of comment types.**
   Your file should show how you handle: major revisions, minor corrections, requests for additional experiments, methodological challenges, and requests for clarification.
4. **Label each example clearly in the file.**
   Add a header before each example such as: --- Example 1: Journal of Medical Imaging, 2023 --- This helps Claude reference specific examples when explaining its choices.

Recommended file format

Save your example file as a Word document (.docx) or plain text file (.txt). Both work well. Name it something clear:

- `My_Reviewer_Responses_Examples.docx`
- `Peer_Review_Style_Examples.txt`

Skill Step 2 - Create the Skill File

A Skill is a structured file that tells Claude how to behave. Instead of writing it manually, you can ask Claude to build it for you by analyzing your own work.

How to do it

1. Gather 2–5 examples of peer review responses you have written before and save them in a single document (Word, PDF, or plain text).
2. Open a new Claude conversation and upload your examples file.
3. Send Claude the following prompt:

"I want to create a Claude Skill that teaches Claude how to write responses to peer review comments (journal/conference reviewer feedback). I've attached a file containing example responses I've written before. Please analyze that file to learn my style, tone, and structure - then write a reusable skill so that in future conversations, Claude can follow the same pattern whenever I need to respond to reviewer comments on my papers. Save the result as a downloadable file named ***SKILL.md****"*

4. Claude will generate a SKILL.md file - click the download link to save it.

Tip: If you only plan to use the Skill by uploading it to a Claude Project or conversation, the plain **SKILL.md** file is sufficient - you don't need to package it as **.skill** unless you're sharing it with others or installing it in Claude Code.

Complete Peer Review Response Skill

```
SKILL NAME: Peer Review Response Writer

PURPOSE
This skill teaches you how to write professional, structured responses to peer
reviewer comments for academic journal and conference submissions. You will
analyse the example response file I upload to learn my personal style, tone,
and structure — then apply that same pattern whenever I need to respond to
reviewer feedback on my papers.

HOW TO LEARN MY STYLE
When I upload my example response file at the start of a session, read it
carefully and identify:
- The opening format I use when addressing each reviewer
- How I acknowledge or thank reviewers before responding
- The structure I use for each individual response (e.g., Summary / Response /
  Changes Made)
- My tone: formal, polite, direct, or assertive when disagreeing
- How I handle major concerns vs. minor concerns differently
- How I reference specific pages, lines, or sections in the revised manuscript
- How I close each response and the overall letter

RESPONSE STRUCTURE TO FOLLOW
Unless my example file shows a different format, use this structure:

  [Opening — thank editor and reviewers briefly]

  REVIEWER 1
  Comment 1: [Quote or paraphrase the reviewer comment]
  Response: [My detailed response — agree, partially agree, or respectfully
  disagree with justification. Reference the specific change made.]
  Manuscript Change: [Page X, Lines Y-Z: Exact change made or explanation
  of why no change was needed]

  [Repeat for each comment from each reviewer]

  [Closing — brief statement that the manuscript is improved and ready]

TONE RULES
- Always be respectful and professional, even when disagreeing.
- Never be defensive or dismissive of any comment.
- When disagreeing, provide clear scientific or methodological justification.
- Acknowledge valid points genuinely before responding.
- Match the level of formality in my example file exactly.

WHAT TO DO WHEN I NEED HELP
When I paste reviewer comments and ask for responses, do the following:
1. Read all comments from all reviewers before writing any response.
2. Identify which comments are major concerns, minor concerns, or requests
   for clarification.
```

```
3. Draft a complete response letter following my style from the example file.
4. For each response, suggest a concrete manuscript change where applicable.
5. If any comment is ambiguous, ask me to clarify before responding.

WHAT YOU MUST NEVER DO
- Do not write generic or template-sounding responses.
- Do not agree with a comment if I indicate I disagree - ask for my position.
- Do not fabricate journal policies, statistics, or literature references.
- Do not skip any reviewer comment, even if it seems minor.
```

Skill Step 3 - Add the Skill to a Claude Project

You can use a Skill in two ways: by adding it to a Project (so it is always available in that project), or by uploading it to a single conversation. For ongoing work, adding it to a Project is recommended.

Option A - Add to an existing Project (recommended)

1. **Open the Project where you want the Skill to be available.**
   For example, open your thesis writing project or your paper revision project.
2. **Click "Add Files" and upload both files.**
   Upload: (1) Skill_PeerReviewResponder.txt and (2) My_Reviewer_Responses_Examples.docx
3. **Both files are now part of the Project.**
   Claude will read them in every conversation in that Project and know how to behave when you ask for reviewer responses.

Option B - Use in a single conversation

1. **Start a new conversation anywhere in Claude (inside or outside a Project).**
   You do not need a Project to use a Skill - it works in any conversation.
2. **Click the attachment icon (paperclip) and upload both files.**
   Upload the Skill file and your example responses file at the start of the chat.
3. **Claude will read both files and activate the Skill for this conversation only.**
   The next conversation will not remember the Skill unless you upload the files again.

Skill Step 4 - Use the Skill in a Conversation

Once the Skill is active, using it is simple. You just paste the reviewer comments and give Claude a clear instruction. Here are ready-to-use example prompts.

Example Prompts to Activate the Skill

Prompt 1: Activate the Skill at the start of a session

```
I have uploaded my Skill file (Skill_PeerReviewResponder.txt) and my example
responses (My_Reviewer_Responses_Examples.docx). Please read both files
carefully. When I share reviewer comments, follow the structure and tone from
my example file exactly.
```

Prompt 2: Generate responses to reviewer comments

```
Here are the reviewer comments for my paper submitted to [Journal Name]. Please write a complete response letter following my style from the example file. Address every comment from every reviewer.  [PASTE REVIEWER COMMENTS HERE]
```

Prompt 3: Handle a specific difficult comment

```
Reviewer 2 is asking me to add an experiment I cannot do at this stage. Here is the comment: [paste comment]. Write a polite but firm response that explains why this is outside the current scope, and suggests it as future work. Match my tone from the example file.
```

Prompt 4: Review a response before submission

```
I have written draft responses to Reviewer 1. Please compare them to my example file and tell me if my tone or structure is inconsistent. Suggest improvements where needed.  [PASTE YOUR DRAFT RESPONSES HERE]
```

What to expect from Claude's responses

- Claude will open with a brief, professional acknowledgement to the editor and reviewers.
- Each reviewer's comments will be addressed individually, in order.
- Each response will follow the structure from your example file: acknowledgement, response, and manuscript change.
- Tone will be respectful, direct, and match the formality level of your examples.
- If any comment is ambiguous, Claude will ask for your position before writing a response.

Tips for Getting the Best Results from Your Skill

Situation	What to do
Claude's tone does not match yours	Add more example responses to your file. The more examples you provide, the better Claude learns your style.
Claude misses a comment from a reviewer	Start your next message: "You did not address Comment 3 from Reviewer 1. Please respond to it now."
You disagree with Claude's suggested response	Say: "I actually disagree with this comment for this reason: [your argument]. Rewrite the response to reflect my position."
Reviewer comments are very technical	Paste the relevant section of your paper alongside the comment: "Here is the section they are commenting on: [paste section]. Now write the response."
You submit to different journals with different styles	Create separate example files for each journal style and name them accordingly. Upload the right one per submission.

Situation	What to do
The Skill file needs updating	Simply edit the .txt file on your computer and re-upload it to replace the old version in the Project.

Quick Reference - Projects & Skills Summary

Projects Quick Reference

What you set up	Where to set it
Project Name	Project creation page - Name field
Project Description	Project creation page - Description field
Custom Instructions	Project Settings / pencil icon - Instructions field
Your documents	Project page - Add Files button
New conversations	Inside the project - click New Chat

Skills Quick Reference

What you set up	Where to set it
Skill file (.skill)	Create on your computer, upload to Project or conversation
Example responses file	Your existing responses saved as .docx or .txt
Using in a Project	Project page - Add Files - upload both files
Using in a single chat	Attachment icon - upload both files at the start
Activating the Skill	First message: tell Claude to read both files and follow the Skill

Build your personal AI research toolkit

Projects and Skills work together. A Project gives Claude the persistent context of your work. Skills give Claude the specific behavioural patterns you want it to follow for particular tasks.

As you create more Skills - for writing abstracts, formatting references, reviewing manuscripts, or responding to reviewers - you build a personalized AI research assistant that works exactly the way you do.

★ *Good luck with your research, and may your work make a real impact* ★