

COMPANION TO MODULE 01 · PERSONAL KNOWLEDGE DATABASE

# Set up your **Second Brain** in any AI you already have

Click-by-click for six tools across three paths. The Module 01 prompt works in any AI tool with file context – only the setup steps differ. If your tool isn't listed, find the closest one; the workflow is identical, only the labels shift.

## THE THREE PATHS

### A On your computer

Agent reads your folder and writes the three context files plus a CLAUDE.md / AGENTS.md wrapper at the project root. Future sessions auto-load.

Claude Code · GitHub Copilot Agent · Cursor · Windsurf · Codex CLI · Gemini CLI · Aider

### B In a cloud Project

Upload your docs to a Project once; chat against them across many sessions. You save the three files yourself.

Claude Projects · ChatGPT Projects · Gemini Gems · Custom GPTs · Notebook LM

### C In any chat

Attach files at session start, run the prompt, save outputs. Works everywhere; you'll re-attach next session.

Microsoft 365 Copilot · ChatGPT · Claude.ai · Gemini · Perplexity

## BEFORE YOU START

1. **Files.** 3-5 documents from one project – briefs, notes, decision threads, schemas. (Detail in Module 01.)
2. **An AI tool with file context.** Pick A, B, or C above based on what your tool can do.
3. **~10 minutes.** Setup is one-time. Daily load is < 60 seconds after that.

Full prompt + module page // [pickbits.ai/pkd](https://pickbits.ai/pkd)

PICKBITS.AI // SETUP COMPANION // 1 / 5

## A On your computer

The agent runs the silent inventory, asks 3-5 questions, then writes the three context files into `context-stack/` plus a thin `CLAUDE.md` + `AGENTS.md` wrapper at the project root. The wrapper auto-loads the context files at every future session – daily load becomes “open and ask where I left off.”

### Claude Code

1. Open a terminal in the folder with your project source docs.
2. Run `claude`.
3. Paste the prompt (from `pickbits.ai/pkd`).
4. Answer the 3-5 questions.
5. Approve writes – limited to `context-stack/` plus the wrappers (`CLAUDE.md`, `AGENTS.md`) at the root.
6. The debrief lists what was built. Future sessions auto-load via `CLAUDE.md`.

**Also works in:** *Codex CLI, Aider, Gemini CLI – any terminal agent in a workspace.*

### GitHub Copilot Agent

1. Open your project folder in VS Code.
2. Open Copilot Chat. Switch the mode dropdown from *Ask* to *Agent*.
3. Paste the prompt.
4. Approve tool calls when prompted (`readFile`, `writeFile`).
5. Answer the 3-5 questions.
6. Files appear in `context-stack/`. The wrapper at `AGENTS.md` auto-loads them next time – Copilot reads it as the cross-tool agent-config convention.

**Also works in:** *Cursor, Windsurf, Cline, Continue – any IDE-embedded agent with workspace write.*

**Daily load on Path A:** open a fresh chat in the same folder. Ask “where did I leave off?” The wrapper tells the agent which context files to load. ~30 seconds, no manual references needed.

## B In a cloud Project

Drop your 3-5 source docs into a Project once and they're attached to every chat in that space – closest thing to "wakes up knowing" without folder write. The agent outputs the three context files as *markdown blocks*; you save them locally (and optionally re-upload to the Project so future chats inherit them).

### Claude Projects

1. Sign in at [claude.ai](https://claude.ai). Click *Projects* in the sidebar.
2. Click *Create project*. Name it (a short slug, e.g. **feedrunner**).
3. Open *Project knowledge*; upload your 3-5 source docs.
4. Open a new chat *inside the project*.
5. Paste the prompt. Answer the 3-5 questions.
6. Save the three returned markdown blocks to a local **context-stack/**. Re-upload them to the Project so future chats inherit them.

**Also works in:** *Notebook LM, any "create a workspace, attach files, chat" surface.*

### ChatGPT Projects

1. Sign in at [chatgpt.com](https://chatgpt.com). Click *+ New Project (Plus / Team / Enterprise)*.
2. Name the project. Open *Files*; upload your 3-5 source docs.
3. (Optional) add custom instructions: "Treat attached docs as my Context Stack source."
4. Open a new chat *inside the project*.
5. Paste the prompt. Answer the 3-5 questions.
6. Save the three markdown blocks to a local **context-stack/**. Re-upload them to the Project so future chats inherit them.

**Also works in:** *Gemini Gems, Custom GPTs, Microsoft 365 Copilot Agents.*

**Daily load on Path B:** open a chat in the project (the three context files are already attached). Ask *"load identity.md + the current project-\*.md + state.md, tell me where I left off."* Update **state.md** at session end and re-upload.

## C In any chat

Works anywhere, but you'll feel the friction by week two – every new chat means re-attaching files. The fix is to graduate to Path B once you know the workflow. Until then, this works fine; just budget 90 seconds for daily load instead of 60.

### Microsoft 365 Copilot

1. Open Copilot – copilot.cloud.microsoft, the Edge sidebar, or in-app (Word, Outlook, Teams).
2. Toggle to *Work* scope so it can see your tenant's SharePoint / OneDrive.
3. Either reference docs by name in the prompt ("read the FeedReader brief in OneDrive/Projects/...") or attach them with the paperclip.
4. Paste the Module 01 prompt. Answer the 3-5 questions.
5. Copy each of the three markdown blocks. Save into a Word doc each, or as a local `.md` file.
6. Save to OneDrive in `context-stack/` – keeps them portable across devices.

**Also works in:** *Copilot in Word, Outlook, or Teams; Copilot Pages – UI labels shift, the workflow is identical.*

### ChatGPT (no project)

1. Sign in at chatgpt.com. Start a new chat.
2. Click the paperclip. Upload your 3-5 source docs.
3. Paste the prompt. Answer the 3-5 questions.
4. Copy the three markdown blocks. Save to a local `context-stack/` folder.
5. Next session: re-attach the three context files *and* any updated source docs.
6. When tired of re-attaching, graduate to Path B (ChatGPT Projects on Plus / Team / Enterprise).

**Also works in:** *Gemini app, Claude.ai chat, Perplexity Pro – any chat surface with file upload.*

**Daily load on Path C:** attach `identity.md` + the relevant `project-*.md` + `state.md` to a fresh chat, ask *"load these, tell me where I left off."* ~90 seconds – friction is the cost of universality.

## THE PROMPT – ANNOTATED DIGEST

context-stack-builder.md

Full prompt at [pickbits.ai/pkd](https://pickbits.ai/pkd)

|                                                                                       |                                                                                |
|---------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| "Act as my Context Stack builder."                                                    | One role, one job. Keeps the AI from drifting to generic-assistant mode.       |
| "Read only the folder I share. Write only to context-stack/ and the Path A wrappers." | Safety contract. Scope-limited – no surprise writes elsewhere on your machine. |
| "Skip credentials, .env, anything secret. Note skips in debrief."                     | Visible omissions. You see what didn't go in, not just what did.               |
| "Scan silently. Then ask 3-5 short questions in one message."                         | Inventory before noise; clarification over fabrication.                        |
| "Mark uncertain spots [TBD]. Debrief what you skipped."                               | Visible gaps, not invented confidence. You can trust what's there.             |

## THE DRILL – SETUP IS ONE-TIME, THESE TWO ARE FOREVER

## Daily Load

~30s (A) · 60-90s (B/C)

1. Open your AI. On Path A, the wrapper auto-loads. On B/C, attach the three files.
2. Ask: *"where did I leave off?"*
3. Work. At session end, update `state.md`.

## Monday Reset

~10 min

1. Update each `project-*.md` with last week's decisions and status.
2. Archive last week's `state.md`. Start a fresh one.
3. Prune `patterns/` – delete anything unused in 30 days.

**The failure mode – name it so you avoid it.** Skip the Monday Reset for two weeks and `state.md` becomes a lie. Your AI will load it confidently and answer wrong. The whole system is downstream of this 10 minutes – protect it on your calendar.

1:1 coaching [pickbits.ai/coaching](https://pickbits.ai/coaching) // team training [pickbits.ai/consulting](https://pickbits.ai/consulting) // open source [github.com/pickbitsai/context-stack](https://github.com/pickbitsai/context-stack)

PICKBITS.AI // SETUP COMPANION // 5 / 5