



Organizing **Context** for AI Agents

How to set up the files your AI agent reads.

by **crux**

Applied AI · bycrux.com

BEFORE YOU START

What is context?

Everything the agent can see while it works: your request, its instructions, the files it has opened, and the conversation so far. Beyond general knowledge, that's all it knows about you and your work.

What is a token?

How AI measures text. A token is a short word or part of a longer one, about three-quarters of a word on average. A million tokens is roughly 750,000 words, several novels long.

What is a context window?

How much the agent can hold in view at once, measured in tokens. Most sessions today allow about 1 million. That's large but not unlimited, and each new session starts empty. The more you put in it, the less attention each piece gets.

So the goal is to give the agent what the current task needs, and leave the rest out.

Where context lives, and when the agent reads it

ALWAYS LOADED



Global: your personal file



CLAUDE.md for Claude



AGENTS.md for ChatGPT

Every session, in every folder



Workspace: one per folder



CLAUDE.md for Claude



AGENTS.md for ChatGPT and others

Every session in this folder

LOADED ONLY WHEN NEEDED



Projects

When working on that effort



Areas

When a task touches that area



Resources

When it needs to look something up



Archive

Only when someone asks for history

What's in this guide

Part 1: The entryptpoint

One small file the agent reads every time.

Pages 3 and 4

Part 2: PARA

Four folders for everything else.

Pages 5 and 6

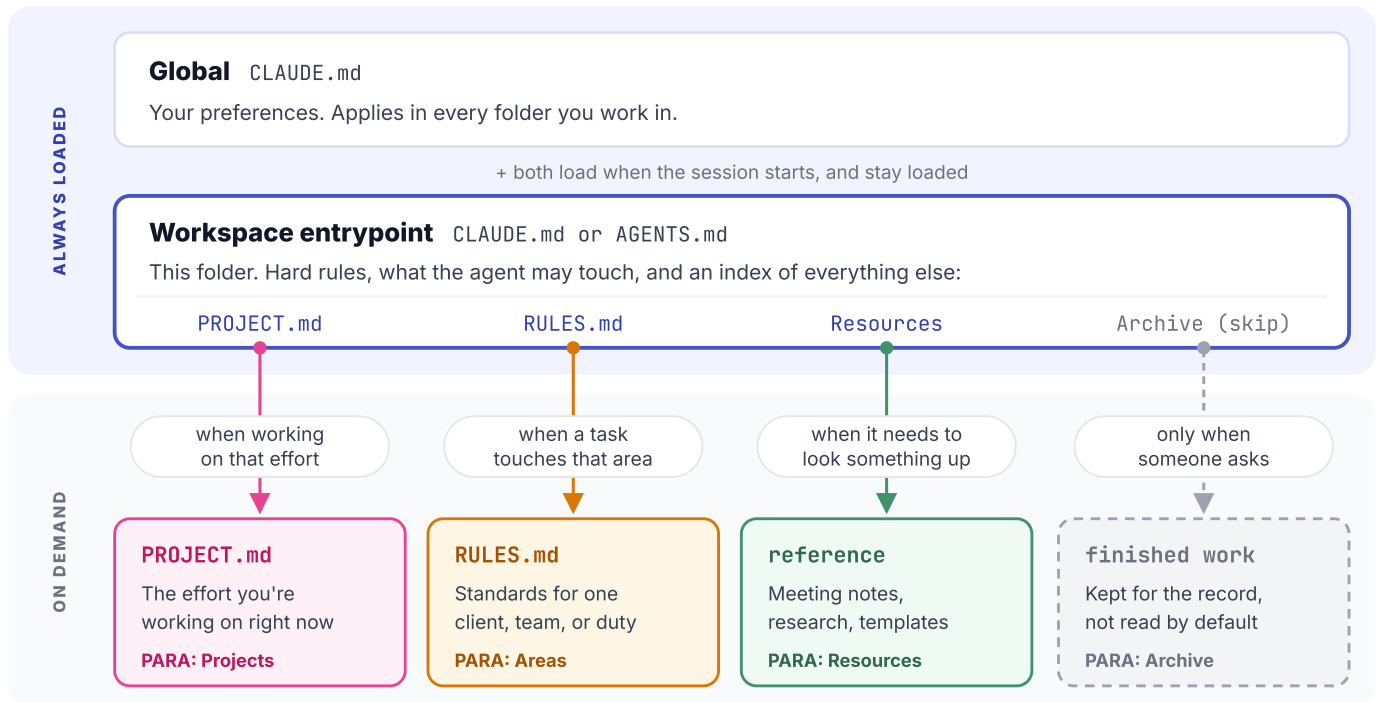
Putting it together

One real task, traced start to finish.

Page 7

The entrypoint loads on every task. Treat it as your most expensive page.

When an agent starts work in a folder, it reads one or two instruction files automatically, before it does anything else. They stay in front of it for the whole session, whether or not they matter to the task at hand.



Global CLAUDE.md

Applies to Every folder you work in
What it holds How you like to work

```

CLAUDE.md
- Lead with the answer. Keep it short.
- Plain English. No jargon, no hype.
- Ask before sending, deleting, or sharing.
- Dates like "Mon, Oct 6". US spelling.
  
```

Workspace CLAUDE.md or AGENTS.md

Applies to This folder and everything in it
What it holds Hard rules, access, the index

```

Acme Co > CLAUDE.md
- Never send to a client without my OK.
- Prices only from the finance rules.
- Keep each client's details private.
- Index: see next page.
  
```

Why keep it small

Attention

Every line competes for the agent's attention. It follows a short list of hard rules more reliably than a long one.

Cost

The file is sent along with every request, so each extra line takes up room on every task, relevant or not.

Freshness

People reread and fix a short file. A long one goes out of date without anyone noticing, and the agent keeps following the old rules.

Keep hard rules and an index. Move everything else out.

A good entrypoint reads like the first page of an employee handbook: what this place is, the lines you never cross, and where to find everything else.

```
Acme Co > CLAUDE.md · example

# Acme Co.
6-person marketing agency: clients, proposals, ops.

## Hard rules
- Never send anything to a client without my OK.
- Prices only from the finance rules. Never guess.
- Never share one client's details with another.
- Save drafts in Drafts. Never overwrite originals.

## Tools and access
- Email and calendar: read-only unless I say send.

## Index: read when relevant
- Each project's PROJECT.md
  before working on that effort
- Areas > Finance > RULES.md
  before quoting prices or invoicing
- Each client's RULES.md
  before any work for that client
- The Resources folder
  search when you need a fact

## Skip
- The Archive folder: inactive, open only if asked
```

What stays in

- 1 What this is**
One line: where the agent is and what it's for.
- 2 Hard rules**
Only rules that must never be broken. Preferences go in your global file.
- 3 Tools and access**
What it can use, and what needs your OK first.
- 4 The index**
Where everything else lives, and when to read it.
- 5 What to skip**
So the agent doesn't wander into stale material.

What moves out, and where it goes

Current work and plans	Projects
Rules for a client or duty	Areas
Meeting notes, research	Resources
Templates and examples	Resources
Past decisions, old work	Archive

Anatomy of an index line

- Areas > Finance > RULES.md : read before quoting prices or invoicing
Where: the file **When: the trigger**

The trigger lets the agent decide for itself whether a file matters for the current task. Without one, the agent either reads everything, which is slow and noisy, or reads nothing and misses the rules.

Point to documents instead of pasting them in. A one-line pointer costs almost nothing until the agent needs it, while a document pasted into the entrypoint is loaded on every task.

CLAUDE.md and AGENTS.md do the same job for different tools: Claude reads CLAUDE.md, and many other agents look for AGENTS.md. If you use more than one agent, keep one file as the source and have the other point to it.

PARA: sort everything by when the agent should see it.

We use PARA, a framework from Tiago Forte (fortelabs.com/blog/para) that sorts information by how actionable it is. It isn't the only system, but it maps neatly onto when a file should load: the more actionable, the more often the agent needs it.

Hot: act on it now

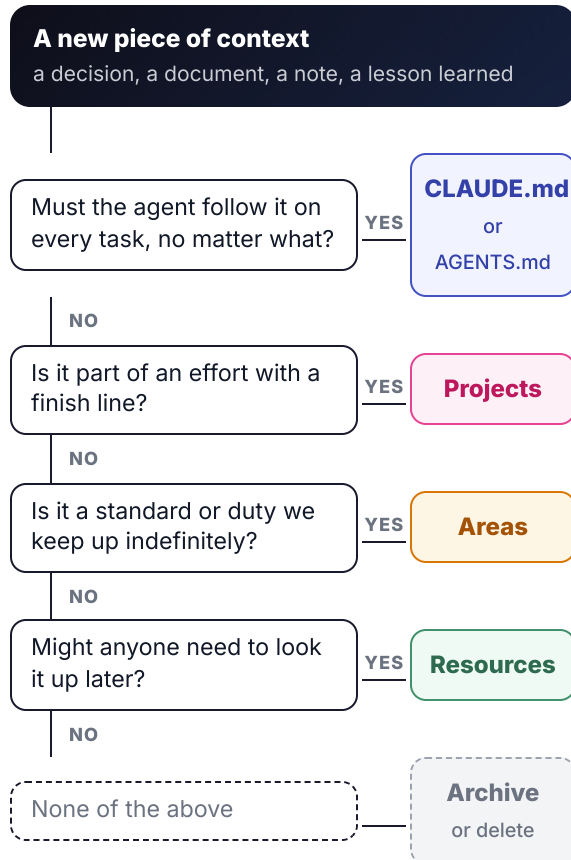
Cold: kept for the record



PARA suits agents for three reasons. Filing is quick: you or the agent can put something away in seconds, with no filing system to design first. The folder says when to load, so the index doesn't have to list every file; "read the project you're working on" covers them all. And old decisions move to the Archive, where they're still available but the agent won't treat them as current.

Where new information goes, and how it moves over time.

Filing is a short decision tree. Ask the questions in order and stop at the first yes. The same tree works for what you hand the agent and for what the agent writes down itself.



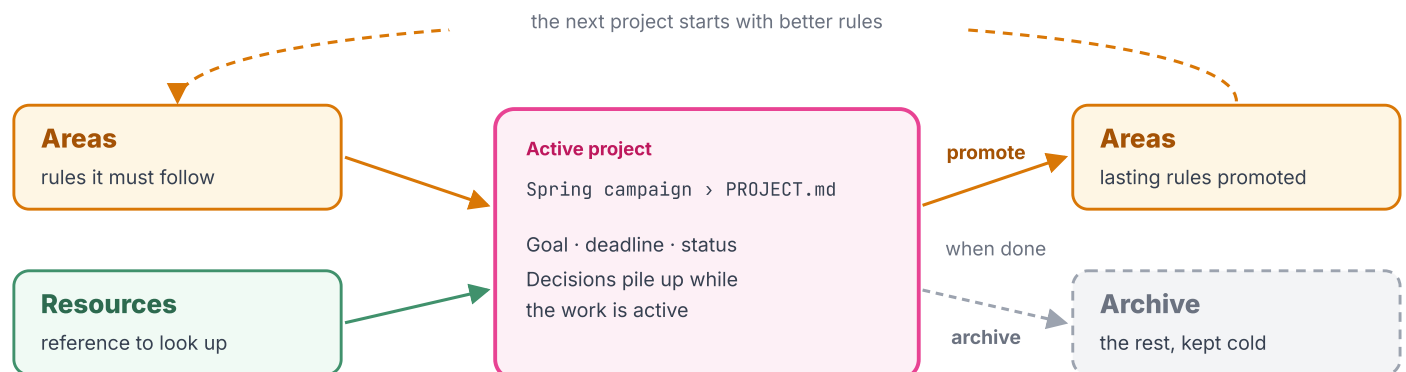
PARA as the agent's memory

Ask the agent to keep its notes in the same folders. The same questions decide where each note goes, so its notes stay as organized as yours.

THE AGENT LEARNS...	...AND WRITES IT TO
"Never send a client anything without my OK."	CLAUDE.md or AGENTS.md under Hard rules, as one short line
"Northwind picked the bold option for the spring campaign."	Projects > Northwind spring campaign PROJECT.md, under Decisions
"Northwind wants invoices as PDFs, sent to their billing inbox."	Areas > Client: Northwind RULES.md
Notes from Tuesday's call with the printer.	Resources > Meeting notes one file per meeting
"The spring campaign wrapped."	Areas Archive Promote lasting rules, then archive the folder

The life of a Project

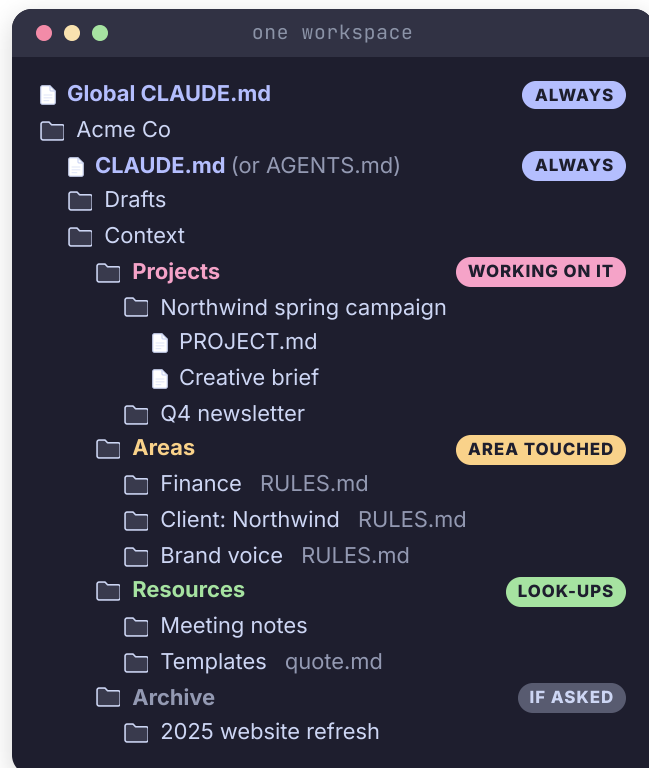
A Project draws on Areas and Resources while it runs. When it's done, the lessons worth keeping move into Areas and the rest goes to the Archive.



Putting it together: one workspace, one task.

Below is an example workspace set up this way, with the files the agent loads for one everyday task.

The workspace



Any folder names work (Context, Notes, Knowledge) as long as the index points to them.

One task, traced

"Draft a quote for Northwind's spring campaign."



Not loaded for this task

Q4-newsletter Brand-voice Meeting-notes Archive

The triggers in the index kept these out, without anyone choosing by hand.

Closing thoughts

A big part of using AI well is organizing context well. The same model gives sharper answers when it sees the right rules and the right documents, and nothing it doesn't need. When the answers are weak, the fix is often in what the agent can see.

None of this has to be perfect on day one. Start with a short entrypoint, a few hard rules and an index, and add folders as the work calls for them. When the agent gets something wrong, ask whether it was missing context or buried in it, then fix the file so the next session gets it right too. Over time the files do the remembering, and each new session starts closer to where the last one left off.

Questions? We can help.

Email us about anything in this guide, or to set it up for your team.

hello@bycrux.com