Checking worksheet

Claude AI & API Integration · 5 evenings online · one sheet per participant. Tick each line when you can show the evidence. Name: _____ Department: _____

Before Day 1 · Setup check

✓	Item	Notes / who
☐	Claude account on a paid plan (Team recommended), signed in on my laptop	
☐	Zoom or Teams tested: camera, mic, screen share, breakout rooms	
☐	Second screen or tablet ready	
☐	Lab files downloaded and opened once	
☐	Claude for Excel add-in installed (Day 3)	
☐	Claude Chrome extension installed (Day 3)	
☐	Microsoft 365 connectors: request sent to IT (Day 3)	
☐	Technical only: Python 3.11+, Node 20+, Git, VS Code, Claude Code installed	
☐	Technical only: Console workspace created, API key saved in a password manager	
☐	Technical only: USD 25 credit or trainer sandbox access confirmed	

Day 1 · Claude fundamentals, prompting and verification

✓	I can confirm	Evidence (file, screenshot, link)
☐	I can explain what the context window is in one sentence	
☐	I rewrote one real request into the four-box brief	
☐	I found all five planted errors against the source CSV	
☐	I signed the verification checklist	
☐	I compared two documents without retyping anything	

Day 2 · Excel, reporting, Projects, Skills, scheduled tasks

✓	I can confirm	Evidence (file, screenshot, link)
☐	I produced a one-page note from the production log in under 15 minutes	

☐	Every figure in my note traces to a cell	
☐	I built a six-slide outline and an Artifact dashboard	
☐	My department Project exists with files, glossary and tone	
☐	I wrote one Skill for a weekly task	
☐	I scheduled one recurring brief	

Day 3 · Claude in Excel, Chrome, Microsoft 365, department labs

✓	I can confirm	Evidence (file, screenshot, link)
☐	I cleaned a workbook with the Excel add-in without leaving Excel	
☐	I turned one web page into a comparison row with the Chrome extension	
☐	I know which Microsoft connector to request first and I sent the request	
☐	My department finished one real task in the breakout room	
☐	The recipe (prompt, files, checks) is written down	
☐	I sorted ten tasks into rules, AI, hybrid	
☐	I took the post-assessment	

Day 4 · Technical: Console, Messages API, SDKs, structured output

✓	I can confirm	Evidence (file, screenshot, link)
☐	My workspace and scoped API key exist with a spend limit	
☐	I compared three models in Workbench and exported the code	
☐	My CLI streams answers and remembers the conversation	
☐	I can read the same call in TypeScript	
☐	I loaded a long document with prompt caching	
☐	My extractor returns validated JSON for all 20 quotations and writes a CSV	

Day 5 · Technical: Claude Code, Agent SDK, MCP, integration, admin

✓	I can confirm	Evidence (file, screenshot, link)
☐	Claude Code shipped the Excel export and the tests pass	

☐	A standard MCP server is connected and answers questions about my data	
☐	My custom MCP server runs and Claude calls it	
☐	I drafted a one-page integration proposal	
☐	I know where SSO, roles, retention and spend alerts live in the admin console	
☐	I took the post-assessment	

Trainer sign-off

Track	Attendance %	Pre score	Post score	Certificate
General, Days 1–3				☐ issued
Technical, Days 4–5				☐ issued

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