

A COMPANION FOR YOUR WORKING DAY

Your personal assistant. Your own space.

A little more clarity.

A little more room in your day.

Vesta Companion brings your priorities, knowledge and everyday workflows together in a folder you control. Give your assistant a name. Teach it what matters. Pick up where you left off.

Portable

Customisable

Built around you

QUICK START + EVERYDAY GUIDE

Version 1.0.0 • September 2026

GET STARTED

Three steps. One useful beginning.

Official download and guides:github.com/Vesta-Software-Group/vesta-companion

On the repository page, choose **Releases**, open the newest release, then select **vesta-companion.zip** under Assets.

01

Download & unzip

Open the Releases page and select **vesta-companion.zip** under Assets. Choose **Extract all** and keep the whole folder together.

02

Open your folder

In your approved AI desktop app, select the extracted folder as a **local project** or connect it as a local folder.

03

Start a conversation

Send the message below. Your Companion will guide you through naming and personalising it.

YOUR FIRST MESSAGE

Read START-HERE.md and system/COMPANION.md. Help me set up my Vesta Companion.

You do not need to code.

No terminal, GitHub account or API key is needed to download and use the kit. Your chosen AI app needs its own approved account, subscription and installation prerequisites.

Choose a private home

A local folder such as `C:\Agents\MyCompanion` is a good starting point. Use a personally restricted, organisation-approved synced folder only when access and backup arrangements are clear. Avoid broadly shared team folders.

Opening a folder alone does not start a chat. Send the first message, and keep the app's permission controls enabled.

YOUR APP

Choose your familiar workspace.

The folder holds your memory. The app provides the AI and its tools.

Codex desktop

Add a local project and choose the Companion folder as its primary folder. Start a local task and send the starter message.

AGENTS.md + skills

ChatGPT desktop

Use Work Local with this folder attached, where available. Ask it to read the shared instructions. Check that it can write back to the folder.

Local file access required

Claude Code Desktop

Choose the Code tab, Local environment and the Companion folder. Send the starter message. Windows setup may require Git for Windows.

CLAUDE.md + skills

Claude Cowork

Connect the Companion folder on desktop. Send the starter message or use the supplied Cowork folder instructions.

Connected folder required

Let the assistant check the connection.

Ask it to save a harmless note, show its location and read it back. If it cannot, setup is not yet persistent. Ordinary cloud chats need a manual file export/import route.

App labels and capabilities vary by version, operating system, plan and company policy. A cloud task stays in the cloud even when shown in a desktop app.

App profiles have different levels of testing. Check reported results and limits before relying on a new app. See [compatibility details](#). Avoid worktrees and simultaneous writers for live personal memory.

PERSONALISE

Make it feel like yours.

You choose the name, the tone and the work it helps with.

Welcome. What would you like to call your assistant, and what would make it useful this week?

Call it Scout. Help me keep track of priorities and prepare for meetings. Keep your answers concise.

I can save that in your profile. Let's add one useful task and check that I can find it in a new conversation.

Illustrative conversation only. Your profile starts blank.

A few useful details

- Your preferred name, role and language.
- Your timezone and working week.
- Your assistant's name and writing style.
- Two outcomes you want help with.

Everything is optional

- Skip a question and come back later.
- Start useful work before setup is finished.
- Connect Outlook or Teams when ready.
- Change your preferences by asking.

TRY THIS NEXT

Remember that I prefer a short recommendation followed by the evidence. Save it in my profile.

Setup saves progress after each step. At the end, you should see your profile, a first useful output and a successful read-back from your local folder.

DAILY BRIEFING

Start with what needs you.

One daily briefing from Outlook, Teams and your local priorities.

YOUR DAILY BRIEF

Illustrative layout

Calendar ✓

Email ✓

Teams: partial

Priorities ✓

Your three priorities

1. Prepare for the decision meeting.
2. Reply to the open question.
3. Unblock the task waiting on feedback.

Today's diary

Times, preparation and conflicts.

Decisions & follow-ups

What needs attention, with sources.

ASK YOUR COMPANION

Create my daily briefing from today's Outlook calendar, recent Outlook emails, my selected Teams chats and my to-do list. Show what you could and could not check.

The briefing highlights decisions, direct questions, deadlines, blockers and preparation. It links back to evidence and removes repeated items across systems. It does not send messages or change your mailbox or calendar.

Useful even without connections.

Start with a local-only briefing from your tasks and saved notes, or provide an approved export. Missing sources must be labelled clearly; no access never means "nothing urgent".

MICROSOFT 365

Connect your tools. Keep your permissions.

Your Companion uses connections available in your chosen app.

- 1 Choose your work account.** Use the AI account and Microsoft 365 account approved by your organisation.
- 2 Open the app's connections settings.** Look for Apps, Connectors or Integrations. Labels vary. Connect Outlook email, Outlook calendar and Microsoft Teams where supported.
- 3 Approve the access you need.** Start with read access for briefings. If a permission needs administrator approval, ask your IT team. Never paste passwords or tokens into chat.
- 4 Pick a useful scope.** Tell your Companion your timezone and which Teams chats or channels matter. You do not need to connect every team.
- 5 Run a small check.** Ask it to identify today's calendar events and one recent relevant message, with source links and an explicit coverage report.

CHECK MY CONNECTIONS

Check which Outlook calendar, Outlook email and Teams read tools you can use. Do not change anything. Explain any gaps and help me run a small test.

If something is missing

Check connections in this specific app; access elsewhere may not carry over. For assignment or consent blocks, ask IT. Continue with a labelled partial brief.

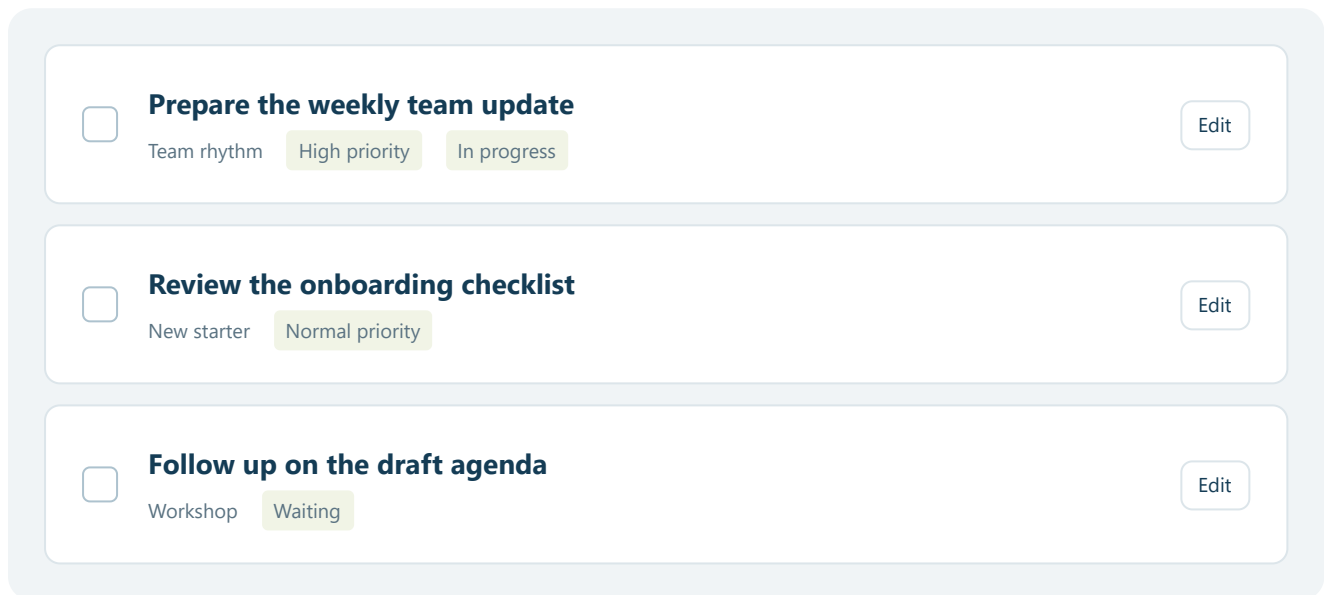
If you want a schedule

Ask for a briefing at a specific time and timezone. The assistant checks the app's scheduler and records one owner. Device and connection availability still matter.

TO-DO BOARD

A calmer view of what comes next.

A clean, local board for priorities, projects and follow-ups.



Fictional examples. [Open the interactive demo.](#)

Just ask

"Add a task to prepare Friday's update."

"Mark the checklist complete."

"Show me my three priorities."

Your Companion updates the task file and produces

`personal/todo/board.html`.

Or use the board

Add and edit tasks, tick them off, search, and filter by project or priority. Keep an eye on the unsaved-changes banner.

The task file is `personal/todo/tasks.json`.

Save in one of two ways.

Direct: choose Open task file, select your tasks.json, then Save to selected file in a supported browser.

Portable: Download changes, then ask your Companion to import that downloaded file. Downloading alone does not update your vault.

If the file changed elsewhere, the board/importer refuses the stale overwrite. Keep your export and ask for reconciliation. One active editor at a time.

MEMORY & CONTINUITY

Keep the context. Change the conversation.

Useful knowledge belongs in your files, ready for the next task.

personal/	Your private working space
profile.md	Your name, preferences and assistant identity
HANDOVER.md	Current work, saved outputs and the next step
vault/	HOME, inbox, contacts, decisions, meetings and journal
todo/	Task data and the interactive board
projects/ · outputs/ · skills/	Your projects, deliverables and custom workflows

Remember the useful things

Setup creates folders for useful notes and a HOME page to find them. Each new note records its type, date, source and confidence. Ask your Companion to save what matters.

Browse with Obsidian

Open `personal/vault` in an approved copy of Obsidian, then open **HOME.md**. Read **vault-conventions.md** for the note guide. No community plugins are installed.

SWITCH APPS WITHOUT STARTING OVER

Save our progress and update HANDOVER.md. Then tell me what the next app should read to continue.

Finish saving before opening the same folder in another app. Ask the new app to read the shared instructions, profile and handover. Check its permissions and connections again.

Local storage is not offline model processing. Relevant content may be sent to your chosen AI provider. Chat history and app-specific schedules do not automatically transfer.

CORE SKILLS

A few good habits. Ready when you need them.

Skills help your Companion follow useful, repeatable processes.

Daily briefing

Your diary, messages and priorities, with sources.

Memory & contacts

Remember context and prepare for conversations.

Planning & projects

Turn an outcome into milestones and next actions.

Meeting preparation

Arrive with an objective, questions and evidence.

Weekly review

See progress, blockers and commitments still open.

Care & customisation

Manage preferences, backups, updates and skills.

You do not need to remember commands

Ask naturally: "Prepare me for tomorrow's meeting", "Remember this contact" or "Review my week". The assistant uses the relevant skill when its app supports discovery, or reads the shared skill index.

MAKE A REPEATABLE WORKFLOW

Help me create a skill for my monthly team update. Ask about my process, draft it, and test it with fictional examples before we use it.

Custom skills stay in `personal/skills`. The assistant explains what they read, write and connect to. Changes affecting external actions or safety require your approval.

Review before you trust.

A skill downloaded from the internet can contain instructions or code. Do not install an unknown collection automatically. A newly created or modified skill is not independently security certified.

IDEAS TO TRY

Shape it around your working day.

Start with one useful workflow. Add more when it earns its place.

For leaders

"Give me a decision brief before the meeting."

"Track the commitments from our review."

"Make my updates shorter and clearer."

For operational teams

"Turn these notes into next actions."

"Show what is waiting for a response."

"Help me write a repeatable checklist."

For project work

"Create a plan with milestones and evidence of completion."

"What is blocking the next step?"

For technical colleagues

"Help me investigate this issue and save the findings."

"Prepare a proposed change for review."

Make the assistant easier to work with

Try a preferred language, a shorter writing style, your working hours, a decision-brief format, a glossary or a recurring review. Keep those preferences in your profile, not hidden in one conversation.

Connect gradually.

Add one approved service, test it with a small read, and understand what access it provides. More connections are useful only when they help with your actual work.

Keep private examples and company-specific workflows inside your personal folder. Share the clean public kit with colleagues so they can make their own.

BACKUP, UPDATES & SAFETY

Keep your Companion safe and recoverable.

Back up your personal folder

Choose an approved private destination. The handover records confirmed backup and restore dates; weekly reminders can be snoozed. Practise restoring a dated copy. Sync can also sync mistakes.

Update alongside, not over

From Releases, expand Assets and download vesta-companion.zip. Extract to a separate folder. Ask your Companion to copy personal files, check notes/tasks/skills and keep the old folder intact. See docs/UPDATING.md.

Keep approvals enabled

Keep the app's sandbox and approval controls enabled. Prefer new document copies. Claude users can ask about the optional settings template for more file-edit and command confirmations.

Keep secrets out

No passwords, tokens, private keys or verification codes in notes, chat or exports. Sign in through the approved app's normal connection flow.

BUILD A RECOVERY HABIT

Help me make a backup plan for my personal folder. Explain the destination and restore steps before copying anything.

Before anything leaves your laptop

Review the exact recipients, destination and content. Email support is draft-only. Other messages and invitations need explicit approval. The daily briefing only reads Microsoft 365.

Share the starter, not your working folder.

Send colleagues the [Releases page](#) so they can choose the newest kit. Never upload your populated assistant, task exports, work screenshots or connection details to GitHub or a public support issue.

The kit's instructions guide behaviour. Your app, operating system and service permissions enforce access. Neither written rules nor a clean scan can guarantee safe behaviour in every situation.

HELP & NEXT STEPS

A good first week starts small.

01

Make it yours

Name your Companion, save one preference and add your first task.

02

Find your rhythm

Try a daily brief and meeting preparation. Add approved connections if useful.

03

Build confidence

Retrieve a saved note in a new task, test a handover, and plan a backup.

If you get stuck

What you see	What to try
"I cannot access that folder"	Check that this is a local task and the folder is connected. Ask for a harmless save/read-back test.
Missing email, calendar or Teams	Check each connection in this app. Ask IT about assignment or consent blocks; use a labelled partial brief.
Board changes disappear	Open the latest tasks.json. Save directly or import the downloaded changes; a browser tab alone is not persistence.
"File changed elsewhere"	Retain your export. Ask your Companion to compare and reconcile it against current tasks.
Codex approval problems	Try Ask for approval (manual) if Approve for me fails. Keep the sandbox enabled. If commands still cannot start, contact IT/app support; manual approval may not fix it.

Bring a real question to setup support.

Have your approved app, extracted ZIP and one useful task ready. See [troubleshooting](#) for connections and local access. Do not use Full Access or change sandbox settings to work around errors.

Official project: github.com/Vesta-Software-Group/vesta-companion

Licence: Apache 2.0. No change to the chosen licence is needed for this original core kit. Vesta branding remains subject to trademark rights.

V1.0: stable core kit; app and connector availability varies. Test scope is in docs/TESTING.md.