



Understanding AI, Claude Code & HAUTE

A VITUITY GUIDE TO AGENTIC AI

HAUTE Platform 2026



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Your journey from chatbots to agentic AI

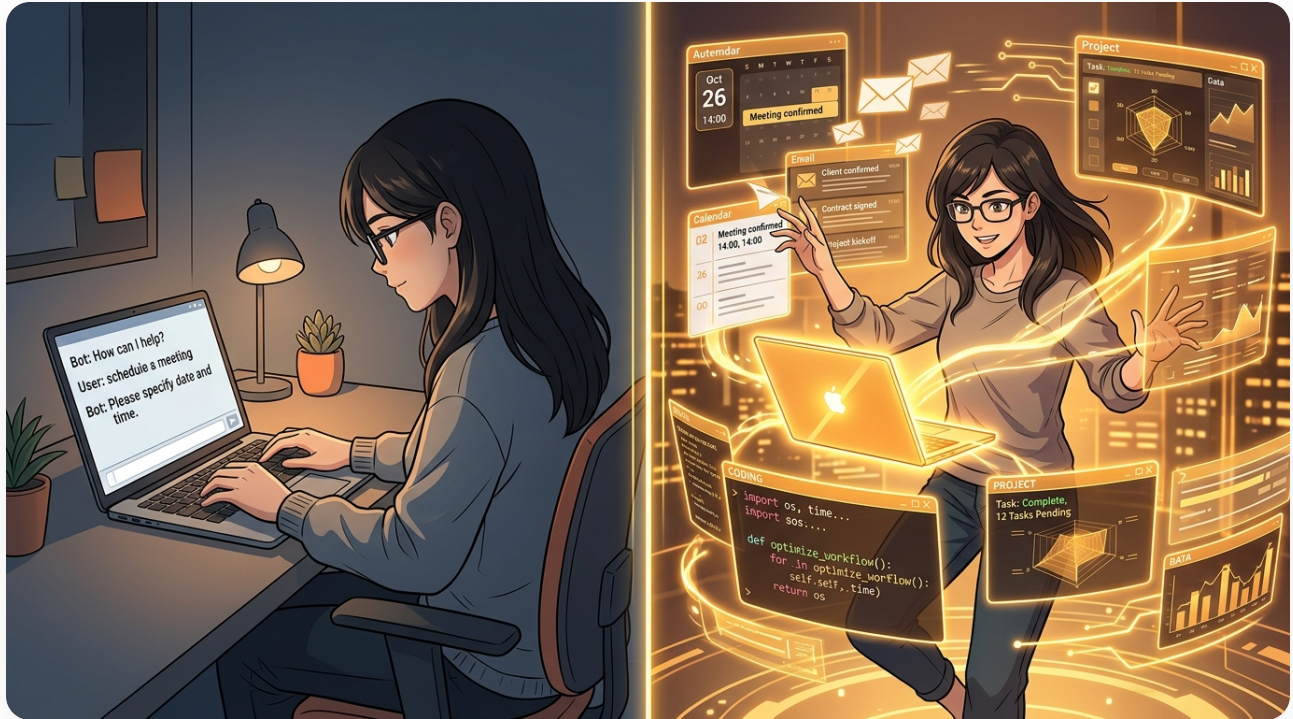
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Who This Guide Is For

Non-technical professionals who want to understand how AI, Claude Code, and the HAUTE platform work together to automate workflows, manage information, and boost productivity. No coding experience required.

01 What is AI Today?

Chatbots, LLMs, and why they matter



You've almost certainly used some form of AI already — whether it's **ChatGPT**, **Via** (Vitaly's internal ChatGPT tool), **Copilot**, or another assistant. All of these fall into the category of a **chatbot**.

A chatbot is a text-in, text-out interface. You type a question, you get an answer. You paste a document, you get a summary. Maybe you upload a photo and get a description. But the key limitation is that **you're constrained within the chat session**. The AI can only respond — it can't reach out and *do* things in your world.

The AI Stack at Vitaly

Layer	What It Is	Example
AI Company	The organization that builds the underlying AI models (called LLMs — Large Language Models)	Anthropic (makes Claude), OpenAI (makes ChatGPT)

Layer	What It Is	Example
Chatbot	A conversational interface for Q&A, writing, and analysis	Claude.ai, ChatGPT, Via
Agentic AI	AI that can take action — read your email, manage your calendar, write code, build things	Claude Code
Enterprise Platform	A layer built on top of agentic AI that adds memory, enterprise integrations, and guardrails	HAUTE

Key Insight

Anthropic is the company that makes the LLMs. **Claude Code** is their agentic AI tool. **HAUTE** is the ecosystem Jeff McDonald built on top of Claude Code to make it enterprise-ready for Vituity.

02 Agentic AI

AI that takes action on your behalf

The word "**agentic**" comes from *agency* — the ability to act. When you use a chatbot, you're having a conversation. When you use agentic AI, you're **delegating real work**.

Claude Code is Anthropic's agentic AI tool. Once set up through HAUTE, it has access to your entire Microsoft 365 environment and can perform actions across all of these systems:

Email

Read, search, draft replies, and compose new messages. Creates drafts for your review before sending.

Calendar

View your schedule, find available times, create meetings, and manage invitations.

Teams Chat

Read messages, send replies, check presence, and participate in conversations on your behalf.

SharePoint & OneDrive

Search documents, read files, access shared content across the organization.

Meeting Transcripts

Access and analyze recordings from your Teams meetings, extract action items and summaries.

Your Local System

Read and write files, install software, configure settings, and build tools directly on your machine.

What Does "Taking Action" Look Like?

Instead of telling you *how* to do something, agentic AI actually *does* it. Here's a concrete comparison:

Chatbot (Via, ChatGPT)

- Tells you how to write a formula
- Suggests email text you copy-paste
- Explains how to organize files

Agentic AI (Claude Code + HAUTE)

- Builds the spreadsheet for you
- Drafts the email in your Outlook

→ Describes how to build a report

- Reorganizes your files directly
- Creates the report and fills in the data

Safety First

Agentic AI always asks for your permission before taking significant actions. With email, it creates **drafts** for your review rather than sending directly. You remain in control.

03 Claude Code

Your personal developer (no coding needed)



Claude Code was originally built to help software developers write programs. But here's the thing: **none of us need to be developers**. You have one of the world's smartest AIs available to do the coding for you.

Why Would You Want Coding?

Claude can create **scripts**, **automations**, **dashboards**, and even full **applications**. Through the course of your work, you almost certainly have manual, repetitive tasks that would benefit from automation. Claude Code makes that possible without writing a single line of code yourself.

You describe what you need



Claude builds it



You review & refine



It's ready to use

Your Role: Product Manager, Not Programmer

Your job is to **specify what you want**. The better you describe it, the better Claude can build it. There are two general approaches:

Vibe Coding

- Throw out a rough idea
- Claude takes a first pass
- You go back and forth iteratively
- Good for exploring possibilities

Structured Specification

- Provide detailed requirements upfront
- Include context about your work
- Specify exactly what you need
- Produces more precise results

"Think of your AI as the world's smartest intern who has no idea what you do — until you tell it."

The better you specify, the better the result. Context is everything.

Custom Skills: Your Personal Toolbox

Once Claude builds something useful, you can save it as a **skill** — a reusable automation you can invoke anytime. Preparing for meetings, pulling reports, analyzing data, triaging emails — each becomes a one-command operation tailored to your specific workflow.

04 MCP — The USB Port for AI

How Claude connects to everything else

For Claude Code to do useful work in your world, it needs to connect to your email, your calendar, your Teams, your knowledge base, and dozens of other services. The technology that makes this possible is called **MCP — the Model Context Protocol**.

"MCP is the USB port for AI agents."

When you need to plug something into your computer, you know how to use a USB port because it's a standard. MCP is that standard — for AI.

How It Works

An MCP server is a small adapter that knows how to talk to one specific service (like Outlook, or JIRA, or SharePoint). Claude Code speaks the standard MCP language. As long as a service has an MCP server, Claude can use it — no custom integration code required.



MCP Servers Bundled with HAUTE

MCP Server	What It Connects To
ht	The unified HAUTE CLI — M365 (email, calendar, Teams, SharePoint), JIRA, Confluence, ServiceNow, Neo4j memory, Obsidian vault
Web search	Brave, Exa, Tavily, Perplexity for live internet research
Gemini, OpenAI	Other AI models for image generation, reasoning, and transcription

Domain-specific

Additional MCP servers can be added based on your role (e.g., security tools for InfoSec)

Why This Matters to You

You don't need to think about MCP day-to-day — it just works. But understanding it helps explain *how* Claude Code can read your email, search SharePoint, look up a JIRA ticket, and check threat intelligence all in one conversation. Each connection is an MCP server, and HAUTE bundles dozens of them so you can plug in whatever your role needs.

05 The HAUTE Ecosystem

Enterprise AI, supercharged

HAUTE (Human-Augmented Unified Team Environment) is the ecosystem built on top of Claude Code that transforms it from a developer tool into an enterprise-grade AI platform for Vitivity.

What HAUTE Adds

Memory

Your AI remembers across sessions — your preferences, your work, your context. It gets smarter over time.

Enterprise Integrations

Connects to Microsoft 365, JIRA, ServiceNow, Confluence, and more — all from one interface.

Guardrails & Safety

Hooks that block dangerous actions, enforce draft-only email, and prevent accidental deletions.

125+ Skills

Pre-built capabilities for email, calendar, project management, legal review, coding, and more.

HT CLI

A unified command-line tool that connects Claude to email, calendar, Teams, memory, JIRA, and SharePoint.

Personalization

Your HAUTE becomes uniquely yours — not an off-the-shelf generic AI, but one that knows you and your work.

The Big Box of Legos

Think of HAUTE as a **big box of Legos**. The platform provides all the building blocks — connectors, memory, skills, safety rails — and you assemble them into whatever you need. Your use cases will be unique to your role, and that's exactly the point: you build something custom, not generic.

Community

Over **220 Vituity employees** are now on HAUTE, including a dedicated **clinical users group** of 15+ clinicians. You can learn from peers, share skills, and adapt automations others have built to your own workflow.

06 Memory & Context

"In the AI world, context is king"



If you've used ChatGPT or other chatbots, you've hit this problem: you have a great conversation, come back the next day (or even the next hour), and the AI knows **nothing** about what you just discussed. You're literally starting over every time.

"In the finance world, cash is king. In the AI world, context is king."

The better context you give your AI, the better results you get.

HAUTE solves this with **two complementary memory systems** that make your AI genuinely personal and persistent:

Obsidian — Your Digital Twin

Think of it like a **reference library** for your AI. Obsidian stores full documents, notes, files, and text blocks. You populate it by

Neo4j — Your Knowledge Graph

A **graph database** that stores information as connected nodes. For example: "Ray" is a node with attributes (email, location, title).

telling Claude to save things, dragging files in, or through automated actions the HAUTE system performs on its own. Over time, this becomes a rich knowledge base of *your* work, *your* context, and *your* domain expertise.

Organized with PARA:

Projects (active work with deadlines)

Areas (ongoing responsibilities)

Resources (reference material)

Archives (completed work)

"IT Department" is another node. The connection between them ("Ray is a member of IT Department") is what makes the graph powerful. When your AI retrieves information, it **traverses these connections** like a chain of thought, linking related pieces of knowledge together.

How Memory Builds Over Time

You don't need to build this all at once. Memory accumulates naturally:

- ✓ Tell Claude **"remember this"** or **"save this to memory"** to explicitly store important information
- ✓ HAUTE's automated processes capture knowledge as you work — it **"squirrels information away"** for you
- ✓ Each conversation adds more context, making future interactions more relevant
- ✓ Over time, your AI stops being generic and becomes **specifically yours**

Why This Matters

Memory transforms your AI from an off-the-shelf tool that anyone could use into a personalized assistant that understands *your* role, *your* projects, and *your* work patterns. It's the difference between a stranger and a trusted colleague.

07 Safety & Privacy

Guardrails, hooks, and staying in control



Agentic AI is powerful, which means it needs strong guardrails. HAUTE is built with **multiple layers of protection** to keep you in control at all times.

Hooks: Your Safety Net

A **hook** is a script that triggers automatically when certain actions occur. Think of them as guardrails that prevent mistakes before they happen:

Hook	What It Does
Deletion Blocker	Prevents Claude from deleting files on your system. If it tries, a red warning appears and the action is blocked.
Draft-Only Email	Email compositions create drafts for your review, never sending directly. You always get the final say.

Hook	What It Does
Permission Prompts	Before making any change, Claude asks for your approval. You say yes, no, or redirect.
Session Bootstrap	Loads your identity, memory, and preferences at the start of every session.

Private Models

HAUTE does **not** use the public Anthropic API. Instead, Vituity runs **private Claude models in our own Azure AI Foundry instance**. This is the same approach Via uses with ChatGPT — keeping data within Vituity's controlled cloud environment.

Things to Keep in Mind

AI Is Probabilistic, Not Deterministic

You won't always get 100% identical results between users or between sessions. AI uses probability to generate responses, so minor variations are normal. Always review important outputs before acting on them.

Be Mindful of Sensitive Data

Claude Code can connect to external services like web search. Just as you wouldn't paste confidential information or PHI into a Google search, don't direct Claude to share sensitive data externally. The private models protect AI processing, but **outbound connections to the internet are not contained**.

08 Getting Started

Your first steps with HAUTE

Installation

HAUTE is set up through a guided session with the IT team. The installer configures everything for you, including Claude Code, the HT CLI, memory systems (Obsidian and Neo4j), enterprise connections, hooks, and skills. The process takes about 60–90 minutes.

What Gets Installed

Component	Purpose
Claude Code	The agentic AI engine — your primary interface for all AI interactions
HT CLI	The HAUTE command-line tool for email, calendar, Teams, memory, and more
Obsidian	Your Digital Twin — a knowledge vault that grows with your work
Neo4j	Your Knowledge Graph — a database of connected information
Settings & Hooks	Safety guardrails, permissions, and enterprise configuration
125+ Skills	Pre-built capabilities for common tasks

Your First Week

- ✓ **Start simple.** Ask Claude to read your unread emails, summarize a meeting transcript, or check your calendar for the week.
- ✓ **Think about repetitive tasks.** Anything you do manually on a regular basis is a candidate for automation.
- ✓ **Build context.** Tell Claude about your role, your projects, and your preferences. The more

context it has, the more useful it becomes.

- ✓ **Ask Claude to save skills.** When it builds something useful, say "save this as a skill" so you can reuse it.
- ✓ **Join the community.** The HAUTE general user group (220+ members) and clinical user group (15+ clinicians) are great places to discover what peers are building.

Pro Tips

Be Specific

Instead of "find that email," say "find the email from Sarah about the Q3 budget from last Tuesday." More context = better results.

Learn from Others

Ask peers to share their skills. You can adapt what others have built to your own workflow in minutes.

Iterate

Your first request won't be perfect. Refine it. Claude learns from the conversation and each iteration gets closer to what you want.

"We're giving you a big box of Legos. Now start building."

Your HAUTE environment is uniquely yours. Make it work for you.