

Setting Up Your Workspace

How to Use This Document:

This document will help you make an informed decision about your document upload methodology. Document Intelligence is a flexible application, and you should feel free to use these suggestions as a starting point to help you generate ideas.

Document Sandbox



- Quick and easy way to get answers from your documents
- This is ideal for teams who have limited time to accomplish their goals
- The workspace will be messier. There is potential for duplicates and unneeded documents, but it can give you a starting point for document research and can be cleaned up as you go using the uncovered metadata.

Clean Workspace



- This method will give you a nearly perfect workspace. Only the documents and data that are needed are uploaded with all relevant associated metadata.
- This workspace takes time to cultivate, as such your time to value will be extended by the length of time it takes to organize and review each document individually.

Blended Approach



- The best of both worlds. This method is a blend of the two methods above. You bias getting documents into the system vs. A perfect environment, but you are willing to take extra time to gather key metadata.
- You will likely still end up with some unneeded or duplicated information, but you can easily sort to just the documents needed according to the pre-established metadata relationships.

