

Prepare your documents for AI search

Turn a document collection into a clear, approved knowledge source.

🕒 4 min read Updated October 2026

Choose a useful collection

Begin with the documents needed for one team or task: policies, product information, manuals, or internal guidance. List their locations, formats, owners, languages, and how often they change. Do not upload a whole company drive without deciding what belongs in scope.

Prepare the information

- Remove outdated duplicates and flag contradictory versions for an owner to resolve.
- Identify restricted documents and which users may access each group.
- Provide examples of questions, expected sources, and answers the system should not attempt.
- Decide how changes, source references, and unavailable answers should be handled.

Review retrieval and answers together

A useful review checks whether the correct documents were found, whether the answer follows them, and whether access restrictions were respected. Prepare test questions with subject experts before approving a launch.

Your checklist

0/4 complete

- ☐ Choose document owners.
- ☐ Create an approved source list.
- ☐ Mark access groups.
- ☐ Prepare questions and expected sources.

A USEFUL NEXT STEP

Share a document inventory first, then agree how sample files will be transferred.

Your signed proposal and agreement define the final scope, fees, responsibilities, and terms.

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