**End-to-End Workflow for EvidenceAI**

**Tech Stack**

| **Tool** | **Purpose** | **Primary Responsibilities** |
| --- | --- | --- |
| **MCP (Claude)** | Advanced processing, analysis, and deliverable generation. | - Metadata extraction - Timeline creation - Pattern recognition - Report generation. |
| **Gemini** | Cross-document analysis and in-depth exploration. | - Entity relationship mapping - Cross-referencing key insights - Identifying discrepancies. |
| **NotebookLM** | Validation and alignment of outputs with original documents. | - Detailed source validation - Context-aware QA - Generating supporting evidence for insights. |
| **ChatGPT** | Formatting and final deliverable enhancement. | - Polish draft outputs from MCP - Create client-facing summaries, FAQs, and reports. |
| **Docugami** | Advanced document processing and data extraction. | - Extract clause-level metadata from contracts and reports - Generate summaries and structured outputs - Integrate detailed insights with Gemini and Airtable. |
| **CloudHQ** | Email retrieval and attachment management. | - Batch download and archival of emails - Export attachments to Google Drive for further processing. |
| **Zapier** | Lightweight workflow automation and client notifications. | - Notifications (e.g., upload confirmation) - Error handling - Client communication triggers. |
| **Google Drive** | Primary file storage and versioning. | - Secure file storage - Folder organization for uploads and deliverables. |
| **Airtable** | Workflow and status tracking. | - Track project progress - Manage client details - Maintain audit logs for deliverables. |

**Workflow Stages**

**Stage 1: Client File Submission**

**Objective:** Provide a secure interface for clients to upload files and initiate the workflow.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Client uploads files | Squarespace → File Request Pro | Clients upload documents via a branded interface, tagging optional metadata (e.g., descriptions). |
| Save files to Drive | File Request Pro → Google Drive | Files are stored securely in Google Drive folders (e.g., /Clients/<ClientName>/RawDocuments/). |
| Log uploads | Zapier → Airtable | Zapier logs file metadata in Airtable (e.g., upload time, client name) and updates the status to "Uploaded." |
| Notify client | Zapier → Email | Clients receive an automated email confirming successful upload. |

**Stage 2: File Organization and Metadata Extraction**

**Objective:** Organize raw files into categories and extract key metadata for structured processing.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Organize files | MCP → Google Drive | MCP categorizes and tags files (e.g., "Emails," "Contracts") based on content. |
| Extract metadata | Docugami → Airtable | Docugami processes contracts, reports, and other documents to extract metadata (e.g., dates, parties, terms). |
| Retrieve emails | CloudHQ → Google Drive | CloudHQ batches emails meeting specific criteria, exporting attachments to Google Drive. |
| Cross-check metadata | Gemini → Airtable | Gemini validates metadata consistency across documents and flags anomalies. |
| Update file status | Zapier → Airtable | Zapier updates Airtable records to "Organized" after metadata extraction and validation. |

**Stage 3: Document Analysis and Insight Generation**

**Objective:** Identify patterns, generate insights, and map relationships across documents.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Summarize documents | MCP → Airtable | MCP generates summaries for each document and links them to metadata records in Airtable. |
| Extract insights | Docugami → Airtable | Docugami generates structured insights from long-form documents (e.g., conflicting clauses). |
| Analyze patterns | Gemini → Airtable | Gemini maps cross-document relationships (e.g., financial dependencies, communication patterns). |
| Enhance insights | ChatGPT → Airtable | ChatGPT synthesizes polished summaries, FAQs, and timelines from outputs. |

**Stage 4: Validation and QA**

**Objective:** Ensure all summaries, timelines, and insights are accurate and aligned with source materials.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Validate outputs | NotebookLM → Airtable | NotebookLM verifies that summaries and insights align with original documents. |
| Identify inconsistencies | NotebookLM → Airtable | Flags discrepancies between generated content and source materials for review. |
| QA enhancements | ChatGPT → Airtable | ChatGPT refines validated summaries for client-facing presentation. |
| Log validation status | Airtable | Validation results are logged as "Validated" or "Needs Review." |

**Stage 5: Deliverable Generation and Sharing**

**Objective:** Generate polished reports and deliverables, notify clients, and track completion.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Generate reports | MCP → Google Drive | MCP compiles deliverables (e.g., reports, timelines) and saves them to the client’s folder. |
| Refine reports | ChatGPT → Google Drive | ChatGPT enhances final outputs for readability and presentation. |
| Notify clients | Zapier → Email | Clients receive an email with links to final deliverables. |
| Log deliverables | Airtable | Airtable tracks deliverables and links to Google Drive for audit purposes. |

**Appendix: POC Simplifications and Future Directions**

**Date/Time:** [Insert current date and time]

1. **Cross-Tool Integrations:**
   * **Current Approach:** Manual integration for Gemini and NotebookLM.
   * **Future Plan:** Automate API-driven workflows to reduce manual effort.
2. **Email Processing:**
   * **Current Approach:** Use CloudHQ for batch email downloads and attachment exports.
   * **Future Plan:** Integrate Nylas or similar tools for automated email retrieval and processing.
3. **Long-Form Document Processing:**
   * **Current Approach:** Docugami extracts metadata and generates summaries for contracts and reports.
   * **Future Plan:** Automate Docugami workflows to directly integrate with Airtable and Gemini.