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

**Tech Stack**

| **Tool** | **Purpose** | **Primary Responsibilities** |
| --- | --- | --- |
| MCP (Claude) | Advanced processing and analysis | - Metadata extraction - Timeline creation - Pattern recognition - Report generation. |
| Gemini | Cross-document analysis and exploration | - Entity relationship mapping - Cross-referencing key insights - Identifying discrepancies. |
| NotebookLM | Validation and alignment of outputs | - 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 - Generate summaries and structured outputs - Integrate detailed insights. |
| CloudHQ | Email retrieval and attachment management | - Batch download and archival of emails - Export attachments to Google Drive for further processing. |
| Google Drive | Primary file storage and versioning | - Secure file storage - Folder organization for uploads and deliverables. |
| Google Sheets | Workflow and status tracking | - Track project progress - Manage client details - Maintain logs for deliverables. |

**Workflow Stages**

**Stage 1: Client File Submission**

**Objective**: Provide a secure and straightforward interface for clients to upload files.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Client uploads files | Google Drive | Clients upload documents directly to a shared Google Drive folder. |
| Organize shared folders | Google Drive | Securely organize files into client-specific folders (e.g., /Clients/<ClientName>/RawDocuments/). |
| Log uploads | Google Sheets | Metadata such as upload time, file type, and client name logged manually. |
| Notify client | Gmail (manual) | Send email confirmations. **Placeholder**: Consider automating notifications later. |

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

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

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Organize files | MCP → Google Drive | MCP categorizes and tags files based on content type (e.g., "Emails," "Contracts"). |
| Extract metadata | Docugami | Extract metadata (e.g., dates, parties, clauses) from structured documents. |
| Retrieve emails | CloudHQ → Drive | Batch emails exported to a designated Drive folder. |
| Log file metadata | Google Sheets | Metadata and organization status recorded manually. |

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

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

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Summarize documents | MCP → Google Sheets | Generate summaries and link them to metadata records. |
| Extract insights | Docugami | Generate structured insights from contracts and reports. |
| Map relationships | Gemini | Cross-reference entities and patterns for deeper analysis. |
| Enhance insights | ChatGPT | Create polished outputs like FAQs and timelines from structured insights. |

**Stage 4: Validation and QA**

**Objective**: Ensure accuracy and alignment of all insights and outputs with source materials.

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Validate outputs | NotebookLM | Compare generated outputs with original source documents. |
| Identify inconsistencies | NotebookLM | Flag discrepancies or missing details for review. |
| Refine summaries | ChatGPT | Edit and enhance validated summaries for client-facing deliverables. |
| Log validation status | Google Sheets | Record QA outcomes as "Validated" or "Needs Review." |

**Stage 5: Deliverable Generation and Sharing**

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

| **Step** | **Tools** | **Details** |
| --- | --- | --- |
| Compile deliverables | MCP → Google Drive | Save final deliverables (e.g., reports, timelines) to client-specific folders. |
| Refine deliverables | ChatGPT | Enhance readability and presentation of reports. |
| Notify clients | Gmail (manual) | Send links to finalized deliverables. **Placeholder**: Explore automation options. |
| Log deliverables | Google Sheets | Track deliverable status and link to storage locations. |

**Appendix: Future Tools and Workflow Enhancements**

**1. File Request Pro**

* **Purpose**: Streamlined file submission with metadata tagging.
* **When to Use**: For higher client volume or more structured intake processes.

**2. Zapier**

* **Purpose**: Automate repetitive tasks like notifications and data movement.
* **When to Use**: If manual workflows become inefficient.

**3. Airtable**

* **Purpose**: Advanced workflow tracking and database management.
* **When to Use**: When scaling requires more structured data handling than Sheets.

**4. Nylas or Similar Tools**

* **Purpose**: Sophisticated email processing and integration.
* **When to Use**: If CloudHQ becomes insufficient for handling email data volume or complexity.

**5. Custom API Integrations**

* **Purpose**: Direct API connections for tools like Gemini, NotebookLM, and Claude MCP.
* **When to Use**: When robust APIs become available for smoother automation.