Document Consolidation System - User Guide

🚀 Quick Start

This system transforms your collection of work-in-progress documents into a single, polished master document. It preserves your best ideas, tracks how your thinking evolved, and identifies gaps that need attention.

What You'll Need:

- Your WIP documents (any text format)
- 30-60 minutes for review and approval steps
- An AI system (ChatGPT, Claude, etc.) or API access

What You'll Get:

- A professional master document
- Complete changelog of decisions
- List of gaps and next steps
- Archive of original documents
- Visualization data for concept maps

📋 Pre-Consolidation Checklist

Before starting, gather your documents and consider:

☐ **Document Collection**: Have all WIP documents in one folder
☐ **Document Naming**: Name files clearly (e.g., `ProjectX_InitialDraft.txt`, `ProjectX_RevisionNotes.md`)
☐ **Metadata**: Note creation dates if not in file properties
☐ **Desired Tone**: Decide on formal/professional vs. conversational
☐ **Time Allocation**: Block 1-2 hours for the full process

🔄 The 5-Step Process

Step 1: Analysis & Discovery (15-20 minutes)

What happens: The AI reads all documents and identifies key concepts, scores their importance, and finds conflicts.

Your input needed:

1. Paste all document contents with clear labels

2. Provide any known creation dates

3. Specify if any document should be prioritized

What to expect:

```json
{
  "concepts": [47 key ideas found and scored],
  "conflicts": [8 contradictions identified],
  "gaps": [5 missing pieces flagged]
}
```

Decision point: Review the analysis. Does it capture your main ideas? Are important concepts scored appropriately?

Step 2: Structure Proposal (10-15 minutes)

What happens: The AI proposes a Table of Contents for your master document.

Your input needed:

- Review the proposed structure

- Approve, modify, or reorganize sections

- Flag any missing topics

What to expect:

```markdown
## 1. Introduction and Vision
   *Sources: Doc_B, Doc_D*
   *Status: Ready*

## 2. Core Business Model
   ### 2.1 Subscription Framework
   *⚠️ CONFLICT: Pricing needs resolution*
```

✋ **STOP POINT**: This is your main control checkpoint. Don't proceed until the structure looks right!

Common modifications:

- Reordering sections for better flow
- Combining similar sections
- Adding missing topics
- Removing irrelevant sections

Step 3: Content Synthesis (20-30 minutes)

What happens: The AI merges all content according to your approved structure.

Your input needed:

- Provide the approved TOC
- Confirm conflict resolution approach
- Specify any special handling for certain sections

What to expect:

- Merged content with source attribution
- Editorial notes explaining major decisions
- Gaps clearly marked with 📌
- Conflicts resolved with explanations 💡

Quality check: Scan for:

- Lost important ideas
- Incorrect conflict resolutions
- Sections that need more detail

Step 4: Editing & Polish (10-15 minutes)

What happens: The AI refines the document for professional quality.

Your input needed:

- Confirm desired tone and style
- Specify any industry-specific terminology
- Note required reading level

What to expect:

- Polished prose with smooth transitions

- Consistent terminology

- Executive summary

- Professional formatting

Review focus: Check that the voice sounds right and the document flows naturally.

Step 5: Final Package Generation (5-10 minutes)

What happens: The AI creates all deliverables and supplementary materials.

Your input needed:

- Specify output formats needed

- Confirm visualization requirements

- Note any special archival needs

What to expect:

```
/output/
├── master_document.md (final polished version)
├── executive_summary.md (2-page overview)
├── changelog.md (every decision documented)
├── next_steps.md (gaps and action items)
├── /supplementary/
│   ├── concept_evolution.json
│   ├── confidence_scores.csv
│   └── relationship_diagram.mermaid
└── /archive/
    └── [your original documents, unchanged]
```

💡 Operating Tips

For Best Results:

1. **Document Preparation**:
   - Remove any sensitive information first
   - Include dates or version indicators in your documents

- Separate true drafts from reference materials

2. **During Analysis** (Step 1):
   - Check that all key concepts were found
   - Verify conflict identification makes sense
   - Note any surprises in the scoring

3. **Structure Review** (Step 2):
   - Think about your audience
   - Consider logical flow of information
   - Don't skip this approval step!

4. **Quality Markers to Watch**:
   - High confidence scores (>80%) indicate clear content
   - Multiple conflicts in one area suggest needs human review
   - Gaps in critical sections require follow-up

Common Scenarios:

"I have 20+ messy documents"

- Consider pre-grouping by topic
- Run analysis on groups first
- Merge group results in final run

"My documents have lots of contradictions"

- Set clear recency preferences
- Specify which documents are authoritative
- Review conflict resolutions carefully

"I need multiple output formats"

- Master document can be converted (MD → PDF/DOCX)
- Request specific formats in Step 5
- Visualization data can feed into diagram tools

🛠️ Troubleshooting

If the AI produces errors: