

## Discover Dashboard

## Working with Documents

Set Up Document Views  
Discover Documents  
Manage Document Properties  
Submit Documents for Processing  
Send Documents for Review  
Compare Documents  
Cluster Documents/Find Similar  
Add Documents to Subsets

## Working with Documents

The Views page in [redacted] is where we review and action the documents found within our libraries of documents. To be able to look at small groups or subsections of files in a given library, we create library views. A **view** is a dynamic filter that targets a specific set/type of files, for eventual processing in [redacted].



## Use the Views Page:

- To Manage Document Views (Create | Save | Run)
- To Manage Documents (Document Type | Metadata)
- To Update File Metadata
- To Submit Files to an Orchestration
- To Add Files to an AI Subset
- To Send Files for Review

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## Setting Up Document Views

Creating a view involves retrieving a selection of files based on filtered criteria. For example, **View A** might include all files in a library that are PDFs, while **View B** consists of files created within a certain date range. Specific views can be submitted to a workflow within [redacted] for further processing.

## 🔗 To Create a Document View:

1. On the Views page, click the **Filters** tab.
2. Using the three-field Query section, specify the desired view criteria (e.g. File Extension - Equals - .pdf)



**Query Tab** – Add one or more conditions to the metadata included in the filtered view. To view a summary of the full Query with desired conditions, click the **Show Query** button.

**Columns Tab** – Specify which columns are visible/included in the view (e.g. Date Modified)

