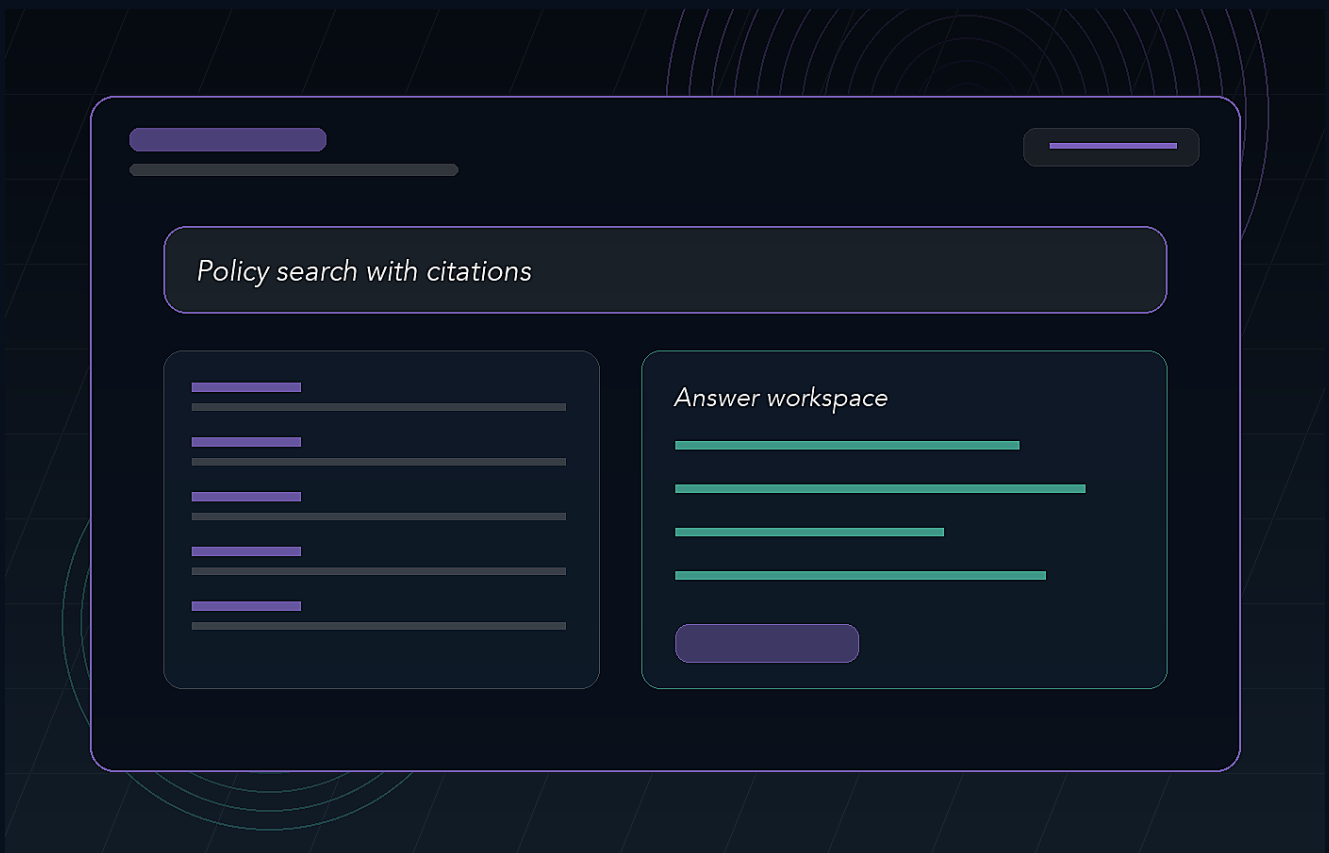


Knowledge Agent

Make policies, contracts, SOPs, and internal documents searchable with citations and permission boundaries.



Pilot scope and deliverables

Start with one department, one document library, and three recurring internal questions.

Expected outputs

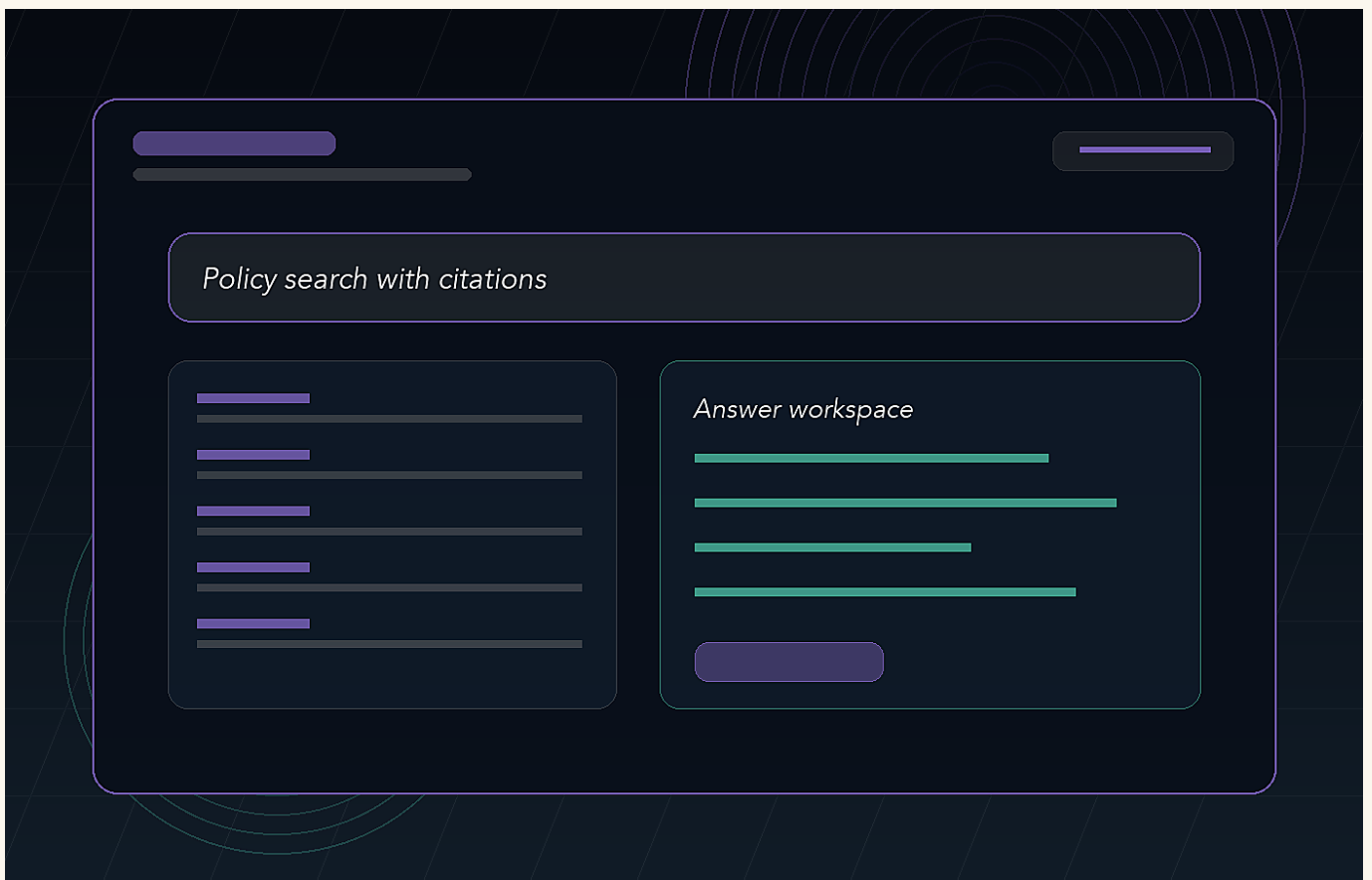
- Indexed knowledge library
- Citation-backed answers
- Role-aware access rules
- Internal FAQ workspace

Required inputs

- Document set
- Role and permission map
- Approved answer style
- Update cadence

Product workspace view

Permission-aware knowledge workspace. Make policies, contracts, SOPs, and internal documents searchable with citations and permission boundaries.



System architecture

01 Document ingestion and version tagging

02 Role and permission matrix

03 Citation-first answer workspace

04 Knowledge gap and update review log

Workflow and acceptance checklist

01 Indexed knowledge library

02 Citation-backed answers

03 Role-aware access rules

04 Internal FAQ workspace

Deployment timeline

01 Week 1: document inventory and access boundaries

02 Week 2: indexing, metadata, and citation rules

03 Week 3: answer workspace and role tests

04 Week 4: department pilot, gap report, update cadence

Implementation milestones

- Discovery decision memo
- Prototype review
- Human approval workflow
- Pilot acceptance and scale recommendation

Customer preparation checklist

- Document folders or exported files
- Access role map
- Document owner list
- SOP or policy update cadence
- Examples of good and bad answers

Questions before pricing

- How many documents and formats?
- How many permission roles?
- Which systems host the source files?
- Who owns document freshness?

Best-fit customers

- Policy-heavy teams with scattered documents
- Professional service firms reusing past deliverables
- Operations teams that need SOP consistency

Required inputs

- Document set
- Role and permission map
- Approved answer style
- Update cadence

Operating playbook and handover

- Workflow blueprint with owner, reviewer, data source, and failure path
- Agent behavior rules, approval prompts, escalation policy, and source whitelist
- Review routine for weekly quality checks, gap analysis, and expansion decisions
- Handover notes for the client-side owner who will operate the pilot after launch

Acceptance table

Citation

Answers cite source documents and sections

Permission

Role tests block restricted material

Coverage

Top recurring questions have approved answers

Governance

Document owner and update cadence are visible

Acceptance criteria

- Answers include citations
- Restricted documents stay restricted
- Outdated material is flagged
- Usage questions are logged

Risk boundaries and human review

- Restricted files stay outside unauthorized roles
- Answers show citations and uncertainty
- Outdated documents are flagged
- No legal or HR decision is made without owner review

Approved source material only

Agents answer from a documented whitelist of files, pages, tables, and policies. Anything outside the scope is treated as unknown until approved.

Role and permission boundaries

We map who can ask, view, approve, export, or escalate. Restricted material is tested with role-based review cases before launch.

Human review before external actions

Email sends, CRM updates, approvals, customer promises, and finance-related actions stay in draft or approval mode until rules are signed off.

Security, governance, and FAQ

Can it read private files?

Only files intentionally provided or connected under agreed access rules.

Does it support policy-heavy teams?

Yes. This is designed for SOP, contract, policy, and training material.

Questions before pricing

- How many documents and formats?
- How many permission roles?
- Which systems host the source files?
- Who owns document freshness?

Start the first workflow review

Share your website, process description, or a small document set. We will reply with a recommended pilot scope, required materials, and a practical deployment path.

Service@goldrenmai.com - +86 15923234233

goldrenmai - Enterprise AI Agent deployment consulting

Service@goldrenmai.com - 11