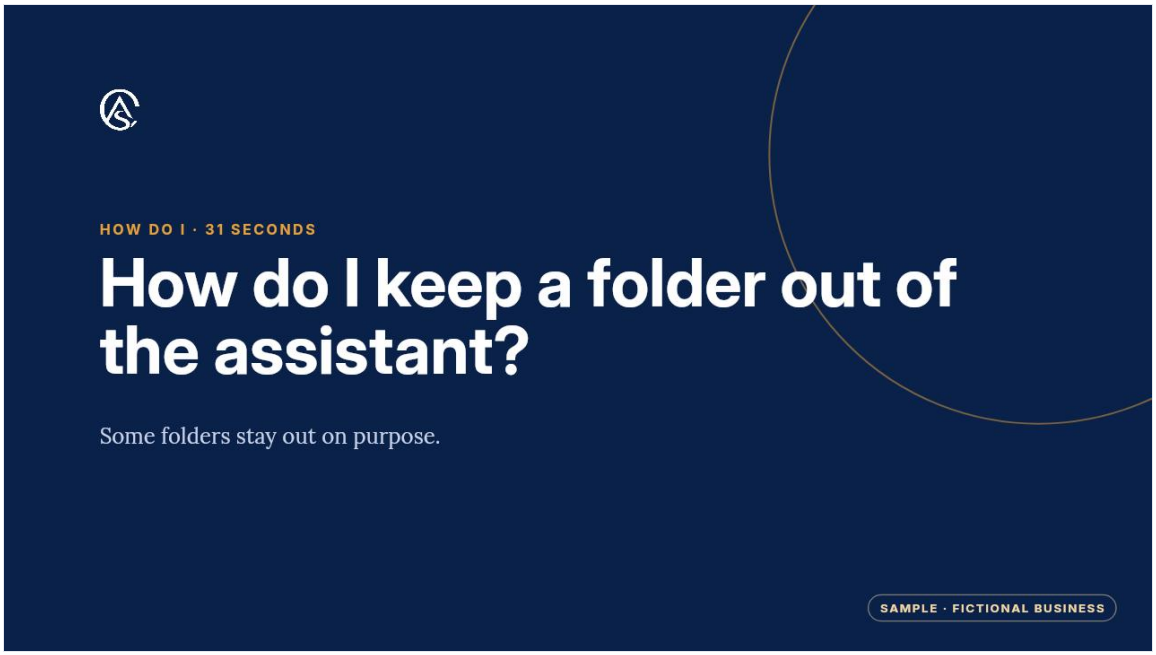
DOCUMENT DESK · HOW DO I

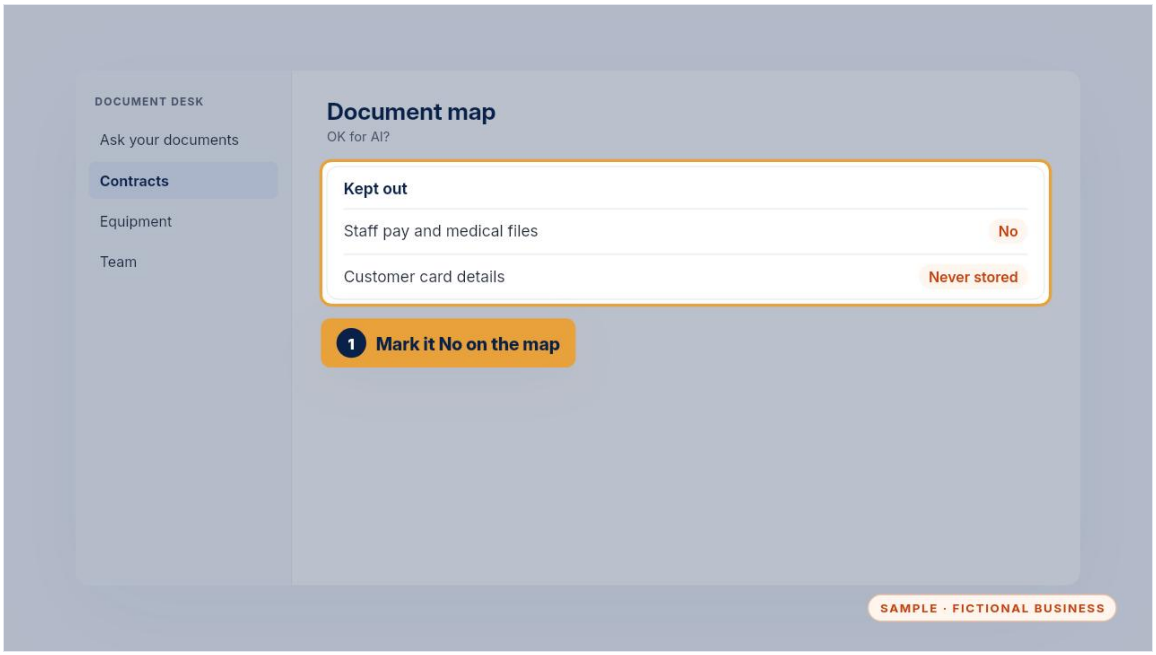
How do I keep a folder out of the assistant?

Keep sensitive folders, like payroll, away from the assistant.

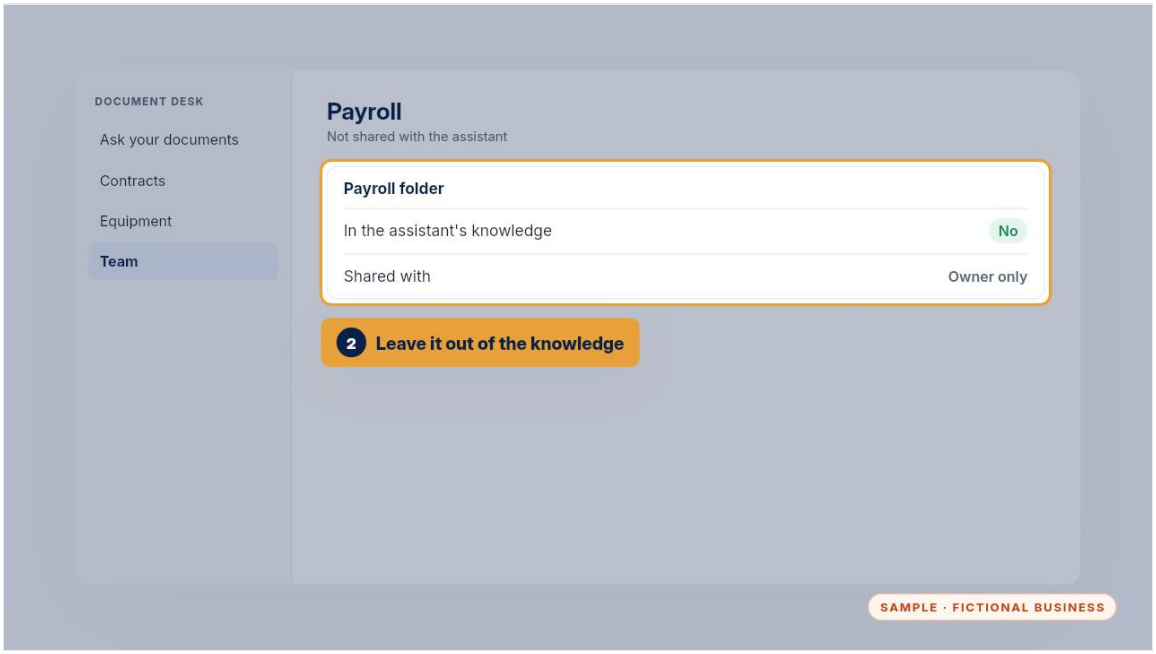
Watch the narrated video: https://openarmsolutions.com/guides/document-desk/keep-a-folder-out



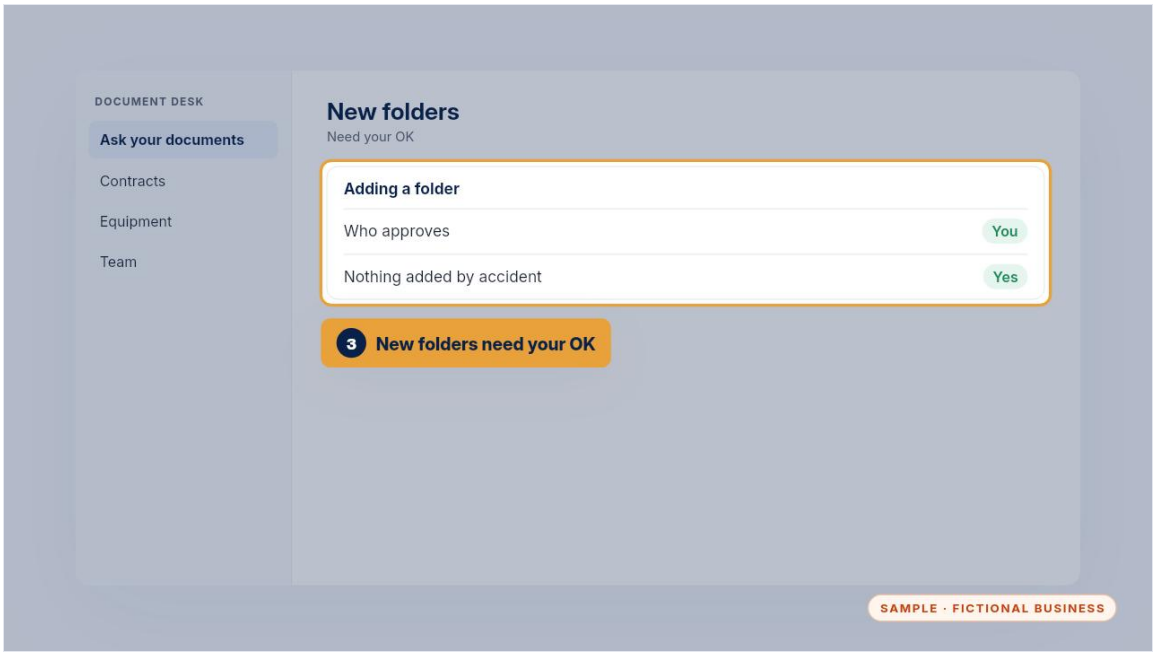
1 Some folders should never be searchable. Here's how to keep one out.



2 Start with the document map. Mark the folder as not OK for AI, like staff pay and medical files.



3 Then make sure that folder isn't one of the assistant's knowledge sources, and that only the owner can open it.



4 On the Install, adding any folder needs your OK, so nothing new becomes searchable by accident.

Remember

1. Mark it No on the map
2. Leave it out of the knowledge
3. Owner-only sharing

SAMPLE · FICTIONAL BUSINESS

5 Mark it on the map, leave it out, and keep the sharing tight.