



DATASHEET · AGENTS · DOCUMENT CHAT

The answer is somewhere in the pile of files?

Ask all your documents at once.

Document Chat answers questions across one, several or all workspaces and names the documents the answer is based on. It works on the index that AI-DMS builds during processing, with no upload per question. For everyone who looks for facts in large collections.

AT A GLANCE

Meaning, file name and data fields, OCR text and entities in one search. The agent reads the matching documents itself and sums them up in one answer with sources.

01 · WHAT IT IS ABOUT

Anyone can ask one PDF. Here, the whole collection answers.

Invoice, credit note and bank statement sit in different documents, often in different workspaces. Anyone answering a question searches, opens and compares by hand. Document Chat searches all selected workspaces, reads the hits and answers with sources.

SCOPE

One, several or all workspaces, a folder or selected documents

SEARCH

Embeddings, file name and data fields, OCR text and entities in one ranking

RESULT

Answer with the documents found, the original one click away

BASIS

Documents processed with AI-DMS, searchable from the Basic tier

**Four sources, one search**

Embeddings for meaning, file name and data fields, OCR text and entities such as companies and amounts, merged by rank fusion.

The agent reads for itself

For the hits, the agent loads text, outline and individual sections and sums up several documents in one answer.

Several workspaces

You choose one, several or all workspaces you are allowed to open. The selector shows which share of the documents is searchable.

Sources in one click

Below the answer, you see the documents found; the sources panel shows the hits of this answer. One click opens the original.

Hits in the list

Below the answer, the chat offers to set the document list to the hits. One click, and the list shows exactly these documents.

Depth by AI-DMS tier

Basic creates embeddings for summary, document and pages. Premium adds entities and relations, Ultra the paragraph level.

02 · HOW IT WORKS

Ask, find, back it up.

The chat sits on the index that AI-DMS builds anyway. You ask the question, the agent searches all sources and backs up the answer with documents.

1

Open the chat

Click **Ask Agent** at the top of the app or press Alt+A.

2

Set the scope

In **Agent context**, choose all workspaces, selected workspaces or the current folder.

3

Ask your question

In your own words, by text or voice, for example: "Which contracts expire this year?"

4

Check the answer

The **Sources** panel shows the hits of this answer. One click opens the original document.

TECHNICAL DATA

FEATURE	DETAILS
Search sources	Embeddings, file name and data fields, OCR text, entities; rank fusion (RRF)
Embedding levels	Basic: summary, document, pages; Premium: + entities, relations; Ultra: + paragraphs
Agent context	All workspaces, selected workspaces, current document, folder, selected documents
Input	Text or voice; PDFs and images in the chat up to 10 MB
Output	Answer with the documents found, original in one click, read aloud
REST API	POST /document_intelligence/embeddings/search: up to 50 hits with score, level selectable
MCP	po_documents_search, po_embeddings_search, po_agents_ask

03 · IN PRACTICE

Where Document Chat shortens the search.

Invoice and credit note

Accounting asks: "Is there a credit note for the Nordlicht Energie invoice?" The chat finds both documents, even in different workspaces, and names them as sources.

Contracts that expire

Management asks which contracts expire this year. The answer names the contracts with their terms; one click sets the document list to these hits.

Documents for an audit

Before a meeting with the tax advisor, the team searches all workspaces for the agreements with a supplier and checks every passage against the original.

FREQUENTLY ASKED QUESTIONS

Do I have to upload documents to ask?

No. The chat works on the AI-DMS index. Whatever is processed in your workspaces can be queried without another upload.

How do I check an answer?

Below the answer, you see the documents found, and one click opens the original. That way, you check every statement against the source before you work with it.

How does the chat find the right passages?

It queries four sources at once: embeddings for meaning, file name and data fields, OCR text and entities. The hits are merged into one ranking, and the agent then reads the matching documents itself.

Which AI-DMS tier does the chat need?

From Basic, OCR text and embeddings for summary, document and pages are created. Premium adds entities and relations, Ultra the paragraph level.

GET STARTED

Ask your whole collection its first question.

Upload documents to a workspace and process them with AI-DMS. Then open the chat with Alt+A and choose all workspaces in **Agent context**.

paperoffice.ai/en/ai-document-chat-rag-questions-answers



MORE ABOUT THE MODULE

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