



DATASHEET • UNDERSTAND • TIMELINE

Which invoice is due first?

Now everything lines up by the date that matters.

The Timeline puts a workspace in chronological order by one of seven date fields, from upload to expiry. For anyone who wants to see deadlines, deliveries and invoices in time order instead of a folder tree.

AT A GLANCE

Seven date fields per document, grouped by day, week or month, with document count and total per period. AI-DMS reads six of them from the document itself.

01 · WHAT IT IS ABOUT

Deadlines hide in paper. The timeline brings them out.

Folders sort by topic, deadlines run by date. To know what is due this week, you would open every document. The Timeline uses the dates AI-DMS reads from your documents and puts them in order.

DATE FIELDS

Added, invoice, due, delivery, document and order date, valid until

GROUPING

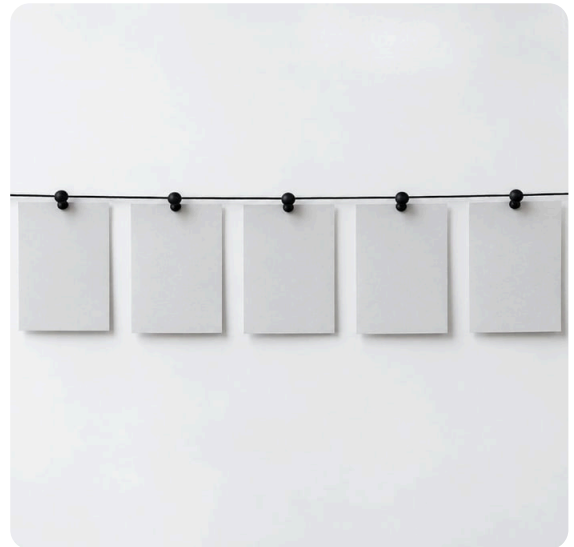
By day, week or month, newest first

PER PERIOD

Document count, total amount in a single currency, document types

ACCESS

View in the document list, via REST API and MCP tool

**Seven date fields**

The system sets **Added** on upload. AI-DMS Premium and above reads invoice, due, delivery, document and order date plus valid until.

The date that matters

You pick the date field. The **Due date** view shows exactly the documents that carry a due date, sorted by that date.

Day, week, month

Three groupings, with calendar week numbers. Each group shows document count, types and the total when all amounts share one currency.

Calendar alongside

The **Calendar** shows which days hold documents, plus daily and monthly distribution. Click a day to jump to that period.

All on the entry

Type, sender, amount and direction, incoming or outgoing. A click opens the document. The document list filters apply here too.

History per document

The **Activities** tab holds notes, tasks with deadline and assignee, and audit results. The **Automation history** shows AI-DMS, IDP Agent and workflow runs.

02 · HOW IT WORKS

Date, sort, follow up.

The Timeline needs no upkeep. It uses the date fields created on upload and when AI-DMS reads the document. You only choose the view, the date field and the grouping.

1

Open a workspace

In the document list, choose the **Timeline** view under **Options** > **Configure view**.

2

Pick a date field

Select a date field at the top of the view, for example **Due date** for everything that has to be paid soon.

3

Group

Choose day, week or month. Each group shows count, types and total.

4

Open the document

An entry opens the document. In the **Activities** tab you add a task with a deadline.

TECHNICAL DATA

FEATURE	DETAILS
Date fields	7: Added (system) and 6 from the document (AI-DMS Premium and above)
Grouping	Day, week (with week number), month
Per period	Document count, types, total in a single currency
Sidebar	Calendar with documents per day, daily and monthly distribution, periods
Per entry	Type, sender, amount, incoming or outgoing, time
REST API	knowledge_graph/timeline with date range and workspace, stats by month, type and partner
MCP	po_knowledge_graph_timeline_get, po_documents_automation_timeline (Claude, Cursor)

03 · IN PRACTICE

When the order is the answer.

This week's payments

Accounting picks **Due date** and groups by week. Each calendar week lists the invoices due with sender and amount, the total on top.

Tracking deliveries

Purchasing switches to delivery date and sees delivery notes day by day. A click in the calendar jumps to the day in question.

Contracts that expire

With valid until and monthly grouping, the Timeline shows which contracts and quotes end in which month.

FREQUENTLY ASKED QUESTIONS

Where do the dates come from?

The system sets **Added** on upload. AI-DMS Premium and above reads the other six dates from the document. You can correct any date in the document.

Are amounts in different currencies added up?

The total per period appears when all amounts share one currency. That way euros and dollars never end up in one number.

Which documents does a date field view show?

The documents that carry that date. With **Due date** you see everything that has a due date, and the order stays clean. Switch to **Added** to see all documents again.

Is there an API?

Yes. The `knowledge_graph/timeline` endpoint returns documents by date with stats by month, type and partner. In Claude and Cursor the tool is `po_knowledge_graph_timeline_get`.

GET STARTED

See your workspace as a timeline.

Open a workspace in the app, choose the **Timeline** view under **Options › Configure view** and set the date field to **Due date**.

paperoffice.ai/en/ai-timeline-chronological-view



MORE ABOUT THE MODULE

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