



DATASHEET · CAPTURE · WORKSPACES

Every document in one pot, visible to everyone?

Each task gets its own security level.

A Workspace separates documents by client, department or project. It sets how deeply AI-DMS reads, who has access, how it is protected and who it is shared with. Built for law and tax firms, departments and anyone who keeps sensitive files cleanly apart.

AT A GLANCE

Three Workspace types from Standard to Compliance, one AI-DMS tier per Workspace, a password, SMS code or 2-person approval, and external shares with an expiry date.

01 · WHAT IT IS ABOUT

Everything sits in one pot. Every area gets boundaries.

HR files next to incoming invoices, client A next to client B, one folder for everyone. Whoever searches sees too much. A Workspace draws the line: its own type, its own processing, its own rights and its own access protection, in the app, via REST API and over MCP.

WORKSPACE TYPES

Standard, Business and Compliance, upgradable at any time

AI-DMS

Per Workspace: Storage only, Basic, Premium or Ultra

ACCESS PROTECTION

From Business: password and SMS code, plus 2-person approval in Compliance

STORAGE

PaperOffice cloud or your own SFTP storage (BYOS), fixed at creation



Three Workspace types

Standard to store and find, Business to share, protect and restore, Compliance for evidence and audit readiness.

Trash from Business up

In Business and Compliance, deleted documents go to the trash and can be restored. Standard Workspaces delete permanently.

AI-DMS per Workspace

Each Workspace sets how deeply new documents are read. Afterwards, the selected IDP Agents run in a fixed order.

Access protection

A Workspace password on top of the sign-in, a 6-digit SMS code each time it opens, and in Compliance also 2-person approval with two SMS codes.

External sharing

Share Business Workspaces by email, phone or both, to view and download or also to upload. Revoking takes effect immediately.

Watermarks in Compliance

Previews and PDF downloads from Compliance Workspaces carry a personal watermark with the user and the time of access.

02 · HOW IT WORKS

One dialog, eight tabs. Then the boundary stands.

Everything a Workspace defines is set in one dialog. You can raise the type later and adjust the AI-DMS tier. The storage mode is fixed once the Workspace is created.

1

Create the Workspace

Under **Document AI > Workspaces**, click **Create New Workspace**. On the **General** tab, enter a name and pick a type, such as client, department or project.

2

Set type and processing

On the **Workspace type** tab, choose Standard, Business or Compliance, and on the **AI-DMS** tab the tier for new documents.

3

Set up protection

On the **Access protection** tab, set a password, SMS code or 2-person approval, plus how long access stays valid after SMS approval.

4

Sharing and storage

On the **Sharing** tab, invite external recipients. For your own storage, choose **Own Storage (BYOS)**; the storage mode then applies permanently.

TECHNICAL DATA

FEATURE	DETAILS
Workspace types	Standard, Business, Compliance; upgrade at any time, available types depend on your plan
AI-DMS tiers	Storage only, Basic, Premium, Ultra; a limit on the first pages can be set
Access protection	Password of 4 characters or more, 6-digit SMS code valid for 5 minutes; 2-person approval
Access validity	Business 1 hour after SMS approval, Compliance 1 to 24 hours, inactivity timeout
External sharing	Business: email, phone or both; expires after 7, 30, 90 days, 1 year or open-ended
Group rights	Per Workspace: View + Download, plus Upload, or Full access
Access	Web app, REST API, MCP tools <code>po_workspaces_*</code> and <code>po_workspaces_share_*</code>

03 · IN PRACTICE

Three ways to split. How teams keep things apart.

One Workspace per client

The firm creates a Workspace of type "Client" for each client, Workspace type Business, AI-DMS Premium. The client gets an external share with upload rights for their receipts.

HR files in Compliance

Personnel files sit in a Compliance Workspace with 2-person approval. Downloads carry a watermark, and the HR group alone has full access.

Inbox and departments

A Business Workspace receives the mail, and accounting, legal and sales have their own Workspaces. Workflow Agents move each document to the right one.

FREQUENTLY ASKED QUESTIONS

What sets Standard, Business and Compliance apart?

Standard stores and finds, and deleting is permanent. Business adds the trash, details, a default document type, access protection and external sharing. Compliance adds watermarks and 2-person approval.

Can I change the type later?

Yes, upwards: a Workspace can be upgraded at any time. When it moves to Compliance, existing external shares end, because sharing is for Business Workspaces.

Do the rules also apply via API and MCP?

Yes. The server checks rights and access protection on every call, whether from the app, the REST API or MCP. An AI assistant sees what the connected key may see, Workspace by Workspace.

Where are a Workspace's documents stored?

In the PaperOffice cloud or, with Own Storage (BYOS) , as encrypted archives on your SFTP server. The storage mode is fixed once the Workspace is created.

GET STARTED

Create your first Workspace today

Create an account at app.paperoffice.ai, click [Create New Workspace](#) under [Document AI » Workspaces](#) and set the type, AI-DMS tier and protection. The pricing page shows which types your plan includes.

paperoffice.ai/en/ai-workspaces-security-tiers-document-protection



MORE ABOUT THE MODULE

paperoffice.ai/en/ai-workspaces-security-tiers-document-protection

PRICING

paperoffice.ai/en/pricing

CONTACT

paperoffice.ai/en/contact