

Switching to PaperOffice AI: migration checklist

Ten steps for moving from network drives, legacy systems and mailboxes – from inventory to cut-over, each with the PaperOffice AI features that carry the step.

COMPANY	AREA / PROCESS	REVIEWED BY	DATE
☐ Tick what is regulated and documented in your company ☐ PaperOffice AI features as described on the website			
☐ 01	Take inventory Step 1 · Preparation Where do documents live today: network drives, NAS, legacy-system exports, mailboxes, cloud folders? Volumes, formats and owners per source are recorded.	HOW PAPEROFFICE AI HELPS Storage mounts connect NAS, servers and cloud storage to the AI-DMS via SFTP, WebDAV, S3 or cloud drive. Index leaves the files in place and builds only index and metadata. Import copies into the EU cloud. Filing target stores new documents directly on your storage.	
☐ 02	Define document types and retention Step 2 · Order Document types are named, each with a retention period and an owner. What is no longer needed is sorted out before the move.	HOW PAPEROFFICE AI HELPS Invoice, contract, delivery note, quote, letter and many more from the catalog, plus your own. Periods per type, optionally with WORM protection for regulated documents.	
☐ 03	Structure: clients, departments, projects Step 3 · Workspaces The target structure is decided: which areas stay separate, which security tier applies, who is responsible.	HOW PAPEROFFICE AI HELPS Workspaces separate documents by client, department or project, with their own security level and processing depth. Standard, Business and Compliance, selectable per workspace, upgradable any time.	
☐ 04	Transfer rights and roles Step 4 · Access Existing permissions are reviewed and cleaned up; users, groups and external access are mapped to the new structure.	HOW PAPEROFFICE AI HELPS Users and groups with read, write and admin permissions per workspace. Yes. Chat, phone and ticket agent, REST API and MCP server work with the workspace permissions, there is no special access.	
☐ 05	Connect storage Step 5 · Connection For every source it is decided: do the files stay where they are (index), are they copied (import), or does the storage become the filing target?	HOW PAPEROFFICE AI HELPS Enter host, credentials and protocol: SFTP or SSH key, WebDAV, S3-compatible or cloud drive. Connection test before saving, credentials stored encrypted. Index leaves the files in place and builds only index and metadata. Import copies into the EU cloud. Filing target stores new documents directly on your storage.	



Pilot and import

Step 6 · Transfer

One area goes first. Import rules (mode, interval, post-import action) are defined and verified on the pilot before the rest follows.

HOW PAPEROFFICE AI HELPS

Import or index, interval from minutes to weeks, post-import action keep, move or delete. When indexing, the originals stay with you, subfolders included on request. Every new file lands in the target workspace and runs through its processing depth: OCR, classification, IDP fields, embeddings. Workflows and webhooks react to the result.



Verify recognition

Step 7 · Quality

A sample is checked: text, tables, document type and extracted fields are correct; exceptions have a path to manual review.

HOW PAPEROFFICE AI HELPS

AI-OCR reads scans, photos and PDFs in more than 120 languages and returns text, tables and bounding boxes per line. Human-in-the-loop routes documents and fields your rules require into a review queue for people.



Set up processes anew

Step 8 · Workflows

Approvals, filing, notifications and archiving are described as rules – not as the habits of individual people.

HOW PAPEROFFICE AI HELPS

The type starts approvals, filing, notifications or IDP agents. Described in natural language, active immediately, without training. Trigger, rule and outcome per process, a log per run.



Evidence and logging

Step 9 · Audit-proof

The move is documented: what was taken over when and from which source, with checksums. Retention periods and WORM protection are active for regulated records.

HOW PAPEROFFICE AI HELPS

Every action with time, user, document and context, field-level on changes: old value, new value. WORM protection and retention periods per document type, deletions themselves are part of the trail.



Cut-over and legacy system

Step 10 · Go-live

From the cut-over date work happens only in the new system; the legacy system stays readable for a transition period. Access for the team, the AI assistant and integrations is set up.

HOW PAPEROFFICE AI HELPS

One AI-DMS, three ways in: Open the app · Connect Claude · API & MCP – Same documents · same rights · everywhere

Note. Every migration is different: volumes, the legacy system and regulatory requirements determine order and pace. This list does not replace project planning. Support for the move is available via support and the partner network on paperoffice.ai.

OPEN ITEM	OWNER	DUE
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