

Dragging every file into the chat?

Your AI assistant asks the archive.

Claude, ChatGPT or Cursor work directly with your documents in PaperOffice, with your permissions and without uploading anything to the chat. This guide shows how to set up the connection, limit it to the right Workspaces and use it safely.



TRY IT YOURSELF IN 30 MINUTES

Create a key, connect Claude, ask your archive the first question.
To try it out, there is a demo Workspace, no account needed.

WHY THIS GUIDE

AI is already part of the team. The documents are not.

Many teams ask Claude or ChatGPT every day. But the contracts, invoices and files they are asking about sit in document management.



Until now, that means: find the document, download it, drag it into the chat, ask the question. Every copy then sits in a chat history, and later nobody knows which version was the right one.

With MCP, it works the other way round: the assistant asks PaperOffice. It searches and reads where the documents are, and only what its key allows. This guide shows the setup step by step, with images from the app, and what you should decide beforehand.

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Founder and CEO, PaperOffice

WHO THIS IS FOR

Teams with Claude or ChatGPT

You want to answer questions about contracts, invoices, and files directly in the chat.

IT and data protection

You create keys, limit access and block it when necessary.

Management

You decide which assistants are permitted to work with which data.

WHAT YOU CAN ACHIEVE AFTERWARD

Create a key for your AI assistant, limit access to specific Workspaces, connect Claude, ChatGPT or Cursor, ask good questions, safeguard write actions and block access at any time.

OVERVIEW

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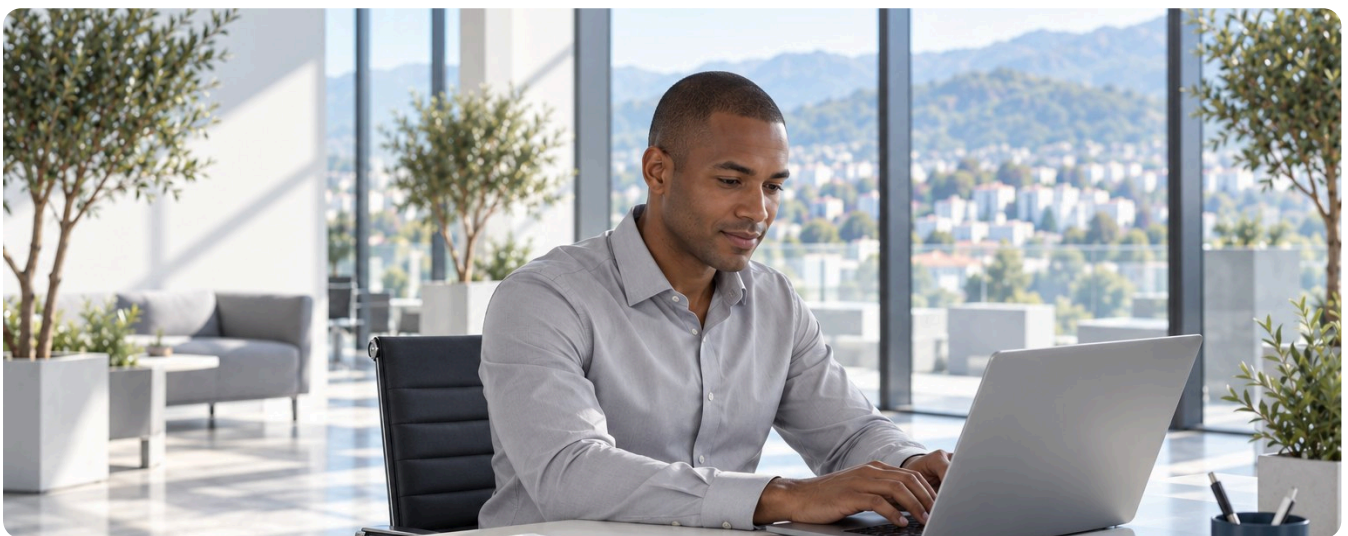
AT A GLANCE

- An AI assistant works directly in PaperOffice via MCP. It searches and reads there instead of collecting copies in the chat.
- It sees only what its key permits. A group token restricts it to the Workspaces of a user group.
- Every tool is marked as reading, writing or deleting. In the assistant, you set what may run without asking.
- Confidential data stays in the archive: no assistant group gets access to Workspaces with personnel files or health data.
- A blocked key disconnects the assistant immediately.

01 · ONE QUESTION, ONE CONTRACT

When does the contract end? Claude looks it up itself.

Kevin Flynn from purchasing at Northstar Industrial Systems wants to know, before the annual review with Kaltwerk, what the maintenance contract costs and when it ends.



Until now, he searches for the contract in PaperOffice, downloads it, drags it into the chat and asks his question there. The copy stays in the chat history, even when an addendum arrives later.

With the MCP connection, he asks Claude directly. Claude searches PaperOffice for Kaltwerk and finds the maintenance contract WV-2026-118 in the Workspace "Contracts". It states an annual flat fee of €4,800 plus VAT and the contract end date of October 31, 2028. For every hit, Claude receives the document name, number and Workspace, so every answer can be checked in the app.

THE REAL HURDLE

An assistant is only as good as what it is allowed to see. The question is not whether it gets access, but to what, with which rights, and who can take it away again.

02 · WHY UPLOADING TO THE CHAT IS NOT ENOUGH

Four problems with copies. One connection solves them.

Dragging a file into the chat is quick. With documents that change and that not everyone may see, it has consequences.

Copies instead of the original

Every uploaded file is a copy. When an addendum arrives, the chat keeps working with the old version.

Permissions stay behind

In PaperOffice, groups and Workspaces control who sees what. A copy in the chat does not know these rules.

One file, one question

Anyone who wants to discuss twenty invoices uploads twenty files and hopes none is missing.

No overview

Later, nobody knows which documents are in which chats.

MCP IN TWO SENTENCES

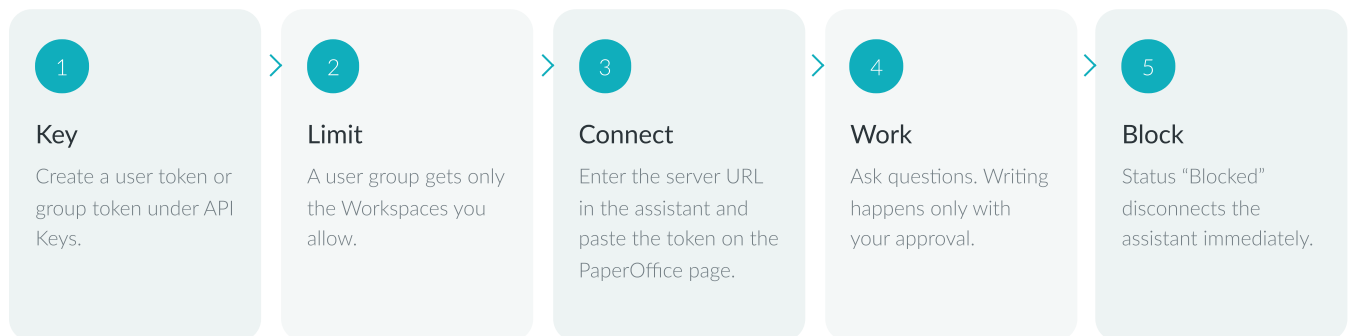
MCP (Model Context Protocol) is an open standard through which AI assistants use the tools of other programs. PaperOffice provides an MCP server: the assistant searches, reads and works through it, within the rights of its key.

WHAT THE ASSISTANT CAN DO	EXAMPLES FROM THE TOOL CATALOG
Search	Full text, recognized fields and meaning, in the Workspaces it may see
Read	Content, recognized fields such as amounts and deadlines, summary, audit results
Add	Create notes and comments on the document
Organize	Rename or move documents, work on tasks

03 · THE PROCESS AT A GLANCE

Five steps. One of them is the off switch.

Setup takes a few minutes. The most important decision comes first: what the assistant may see.



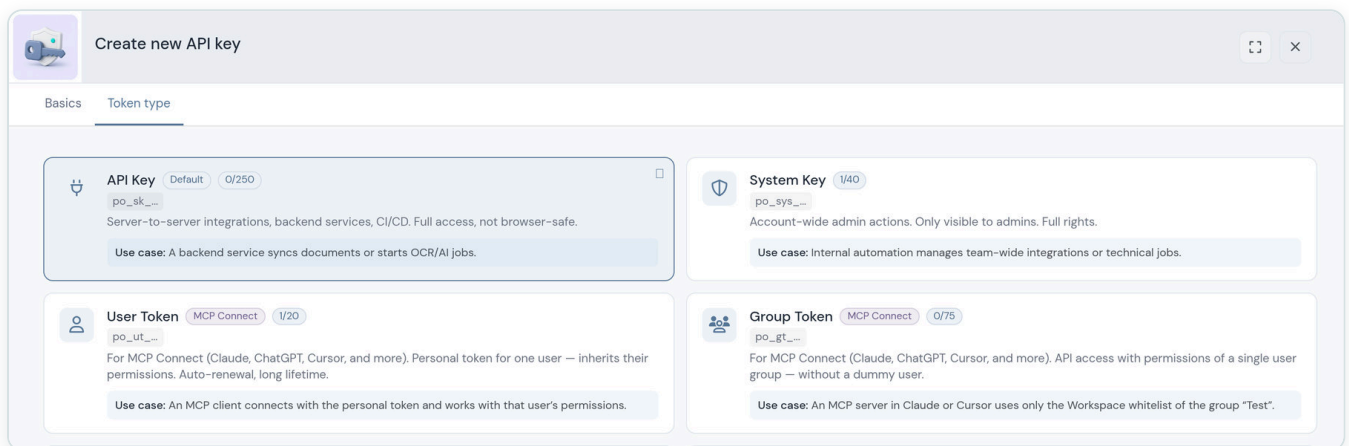
STEP	WHAT PAPEROFFICE DOES	WHAT YOUR TEAM DECIDES
Key	creates the token, copyable at any time in the list	who gets a key
Limit	applies the group's rights to every call	which Workspaces are allowed
Connect	checks the token on every connection	which assistants are allowed
Work	marks every tool as reading, writing or deleting	what may run without asking
Block	rejects a blocked token on the next call	when a key expires



04 · IN THE APP: CREATE A KEY

A key for the assistant. Your rights or those of a group.

In the right sidebar, [API & Developer](#) › [API Keys](#) › [Create New Key](#), then the [Token type](#) tab.



- 1 **Choose Token type.** For Claude, ChatGPT or Cursor, one of the two cards marked "MCP Connect": the user token inherits the rights of the person, the group token those of a user group.

User Token

For your own assistant. It sees exactly what you see. For the account owner, that is everything.

Group Token

For teams and anything that should be limited. Admins can create it; the group must exist first.

Like a password

You can copy the token at any time in the API Keys list. Treat it like a password.

THE FASTEST WAY

Under [Help & Learning](#) › [Set up PaperOffice](#) › [Connect AI assistant](#), "Create token" creates a user token. Next to it are the server URL and the steps for your assistant (Chapter 06).

05 · LIMIT ACCESS TO SPECIFIC WORKSPACES

The assistant sees the contracts. Not the personnel files.

You assign rights once, through a user group. The group token takes on exactly its rights.

- 1 **Group with whitelist.** Under **User Groups**, create a group, for example "AI Assistant Purchasing". In the "Workspaces" tab, choose "Whitelist" and allow only the Workspaces the assistant should see. "View + Download" means read only.

- 2 **Create a group token.** Under "For which group?", choose the new group. With "Valid until", the key expires on its own.

Protected Workspaces

Passwords and SMS codes of protected Workspaces never belong in the chat: through Claude and ChatGPT, the connection does not even accept them. Unlocking happens in the app.

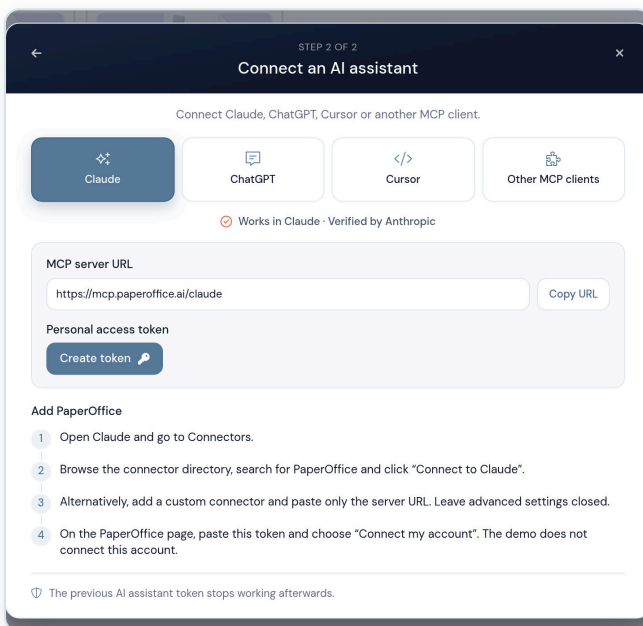
One key per purpose

Purchasing, accounting and sales each get their own group and their own token. That way, each one can be blocked on its own.

06 · CONNECT CLAUDE

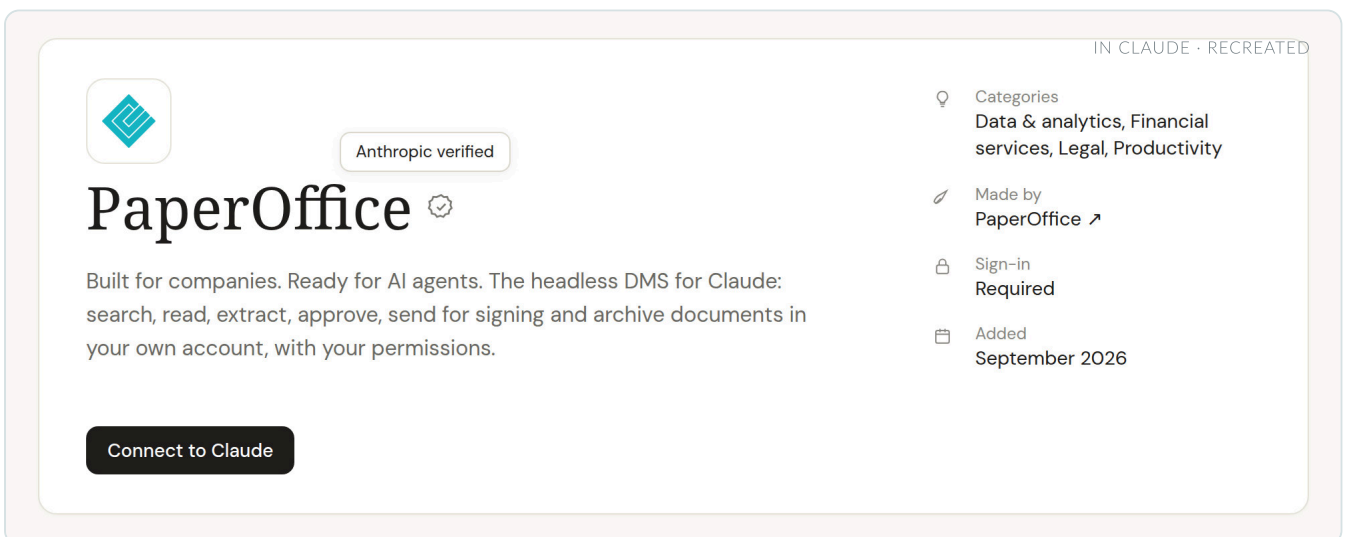
Server URL, token, done. The app shows every step.

Under [Help & Learning](#) › [Set up PaperOffice](#) › [Connect AI assistant](#), choose your assistant. The app shows the matching server URL and the steps.



- 1 **Server URL:** <https://mcp.paperoffice.ai/claude>
- 2 **Token:** "Create token" creates a user token. A token created this way earlier stops working.
- 3 **In Claude:** Under "Customize" › "Connectors", choose PaperOffice in the directory or add a custom connector with the server URL.
- 4 **Sign in:** on the PaperOffice page, paste the token and choose "Connect my account" (Chapter 07).

- 1 **In PaperOffice.** The "Claude" tab: copy the server URL, then "Create token".



- 2 **In Claude.** PaperOffice in the directory, with the "Anthropic verified" seal. "Connect to Claude" opens the PaperOffice connection page.

07 · THE PAPEROFFICE CONNECTION PAGE

Your own account or the demo. You decide on one page.

When connecting, your assistant opens the page “Connect ... to PaperOffice AI”. It offers two ways.

Use your own PaperOffice account

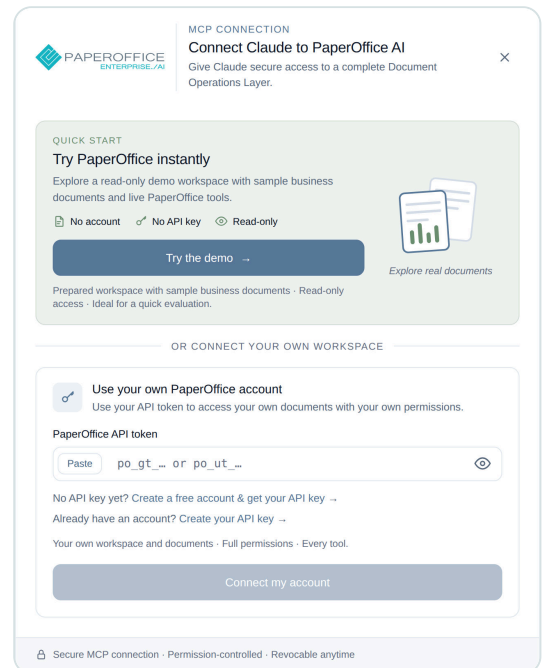
Paste the user or group token and choose “Connect my account”. The assistant then works with the rights of this key.

Try the demo

A demo Workspace with sample documents, without an account or key, read only. Good for a first impression.

“Full permissions · Every tool”

This means all rights of the pasted key. Limit them with the group token (Chapter 05).



MCP CONNECTION
Connect Claude to PaperOffice AI
Give Claude secure access to a complete Document Operations Layer.

QUICK START
Try PaperOffice instantly
Explore a read-only demo workspace with sample business documents and live PaperOffice tools.

☐ No account ☒ No API key ☐ Read-only

Try the demo →

Prepared workspace with sample business documents · Read-only access · Ideal for a quick evaluation.

OR CONNECT YOUR OWN WORKSPACE

Use your own PaperOffice account
Use your API token to access your own documents with your own permissions.

PaperOffice API token

Paste

No API key yet? Create a free account & get your API key →
Already have an account? Create your API key →

Your own workspace and documents · Full permissions · Every tool.

Connect my account

Secure MCP connection · Permission-controlled · Revocable anytime

The connection page for Claude

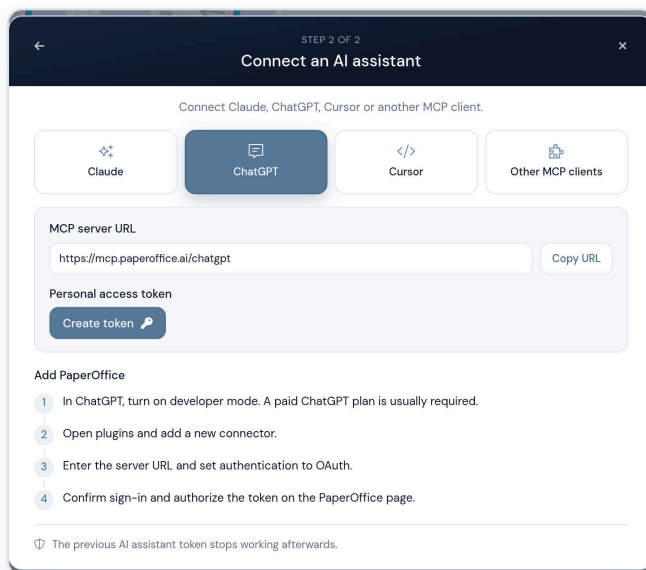
GOOD TO KNOW

Claude does not get your token itself but a connection key of its own. If you block the token in PaperOffice, the connection ends too.

08 · CHATGPT, CURSOR AND OTHERS

Each assistant has its own address. The key stays the same.

The same dialog has the tabs “ChatGPT”, “Cursor” and “Other MCP clients”, each with its own server URL and steps.



- 1 **Developer mode:** turn on developer mode in ChatGPT. This usually requires a paid ChatGPT plan.
- 2 **Connector:** create a new connector, enter the server URL, authentication “OAuth”.
- 3 **Sign in:** on the PaperOffice page, paste the token and connect.

- 1 **ChatGPT.** Server URL <https://mcp.paperoffice.ai/chatgpt>.

ASSISTANT	SERVER URL	TOOLS
Claude	mcp.paperoffice.ai/claude	the full catalog, around 350 tools
ChatGPT	mcp.paperoffice.ai/chatgpt	a selection of 56 tools put together for ChatGPT
Cursor	mcp.paperoffice.ai/cursor	entry in mcp.json; the app shows the block
Other MCP clients	mcp.paperoffice.ai/dms	enter the token as a bearer token

ADDITIONAL PROTECTION RULES FOR CHATGPT

Additional protection rules apply to ChatGPT: personal details such as email address, phone number, IBAN and ID numbers are redacted automatically; personnel, ID, health and insurance documents stay blocked.

09 · ALLOW READING, APPROVE WRITING

Reading is allowed right away. Changes wait for your click.

PaperOffice labels every tool. What may run without asking is set in the assistant.

IN CLAUDE · RECREATED

Tool permissions
 Choose when Claude is allowed to use these tools.

Read-only tools Search documents in DMS List accessible workspaces Get document details and metadata	Always allow ✓ 👤 🚫
Write/delete tools Add document note Move document to workspace Documents Notes Delete	Needs approval ✓ 👤 🚫

1 In Claude. Under "Customize" > "Connectors" > PaperOffice: read-only tools on "Always allow", write/delete tools on "Needs approval". That is our recommendation.

LABEL	MEANING	EXAMPLES
READ-ONLY	only reads, changes nothing	Search documents, view details, list Workspaces
WRITES DATA	creates or changes something	create a note, move a document
DESTRUCTIVE	changes or removes something, or reaches people outside	rename, delete a note, complete a task

Deleting only with approval

Set writing and deleting tools in the client to "Needs approval". The assistant then asks before every change and every deletion.

Read only where that is enough

For plain information, the right "View + Download" is enough. The assistant then changes and deletes nothing, not even after an approval.

10 · GOOD QUESTIONS, VERIFIABLE ANSWERS

Ask specific questions. Get the source with the answer.

The more precise your question, the less the assistant has to guess. Always ask it to name the document.

IN CLAUDE · RECREATED

K

When does the maintenance contract with Kaltwerk end, and what does it cost per year?
Name the document.

◆

Search documents in DMS >

◆

Get document details and metadata >

Maintenance contract WV-2026-118 with Kaltwerk Kältetechnik ends on October 31, 2028. The annual flat fee is EUR 4,800 plus VAT.

The last day to cancel is July 31, 2028, three months before the contract ends.

◆

Source: Maintenance Contract WV-2026-118 - KALTWERK.pdf · Workspace "Contracts Guide"

1 In Claude. Claude searches, reads the contract and names the source. More examples: "Which invoices in the Invoice Fraud Guide Workspace are in quarantine, and why?" and "Summarize the lease for Hall 3: term, notice period, landlord."

HOW TO ASK WELL	WHY
Name the Workspace	The assistant then searches in a targeted way instead of going through all Workspaces.
Ask for the document	For every hit, it gets the name, number and Workspace. That is how you check the answer in the app.
Ask for fields	PaperOffice recognized amounts, dates and deadlines when reading. The assistant uses them instead of estimating.
Let it calculate, then check	The assistant calculates a date minus the notice period itself. Check the result against the contract.

11 · WRITING WITH APPROVAL

A note on the contract. Only after your approval.

If the assistant may write, it works directly in the document: a note, a comment, a new name. With “Needs approval”, it asks first.

IN CLAUDE · RECREATED

K

Add a note to maintenance contract WV-2026-118: Check cancellation by July 31, 2028.

I'll add the note to the contract. The tool writes data, so it needs approval.

Claude wants to use a tool from PaperOffice

Tool	Add document note
Document	Maintenance Contract WV-2026-118 – KALTWERK.pdf
Note	Check cancellation by July 31, 2028.

Deny

Allow

1 In Claude. Because the tool writes data, Claude asks first. Only after your approval is the note on the document, visible under “Activities”.

Add

Create and edit notes and comments.

Organize

Rename documents or move them to another Workspace.

Tasks

Take over, escalate or complete tasks.

DECIDE BEFOREHAND

Which Workspaces an assistant may change is set in the group. For plain information, “View + Download” is enough; then it writes nothing, not even after an approval.

12 · PROTECT CONFIDENTIAL DATA

You decide what the assistant sees. Confidential data stays in the archive.

PaperOffice gives the assistant exactly what its key allows. What it retrieves is processed by its provider in the conversation. That is why you do not release confidential data to it in the first place.



Keep confidential data in the archive

Personnel files, health records and IDs sit in Workspaces that no assistant group sees.

Card numbers masked

Credit card numbers are masked in the results, for every assistant.

More protection for ChatGPT

Personal details are redacted automatically; personnel, ID, health and insurance documents stay blocked.

Your agreements

Which assistant may work with which data is something you agree with the AI provider and record in your data protection documentation.

TRACEABILITY	WHERE
Which key is connected	API Keys list, label "Claude · MCP"
Which tools were called	Log of tool calls, available to your IT through the API
What the assistant has added	Notes and comments on the document; changes to audit-proof documents in the audit history

Seven questions before you begin.



Can the assistant see all documents?

Only those its key may see. With a group token, those are the Workspaces of that group.

Can it delete anything?

Only if its rights allow it. Set writing and deleting tools in the client to "Needs approval"; then it asks before every deletion.

How do I block access?

In the API Keys list, open the key and choose "Blocked". The next call is rejected. You block your own last user token after you have created a second one.

Which assistants work?

Claude, ChatGPT, Cursor, and other MCP-capable clients, each with its own server URL.

Do I need a paid ChatGPT plan?

For developer mode, usually yes. Claude connects PaperOffice through its connector directory.

Can I try it without an account?

Yes. On the connection page, choose "Try the demo": a demo Workspace with sample documents, read only.

What does it cost?

Every call costs Credits, as with the API. The pricing page shows the details: paperoffice.ai/en/pricing.

14 · TRY IT YOURSELF IN 30 MINUTES

The demo first. Then your own archive.

Two ways to try it: the demo without an account, and your own account with a test package from our guides.

CLAUDE AND PAPEROFFICE

Setup, film, and demo on one page

Server URL for Claude <https://mcp.paperoffice.ai/claude>

Demo without an account choose "Try the demo" on the connection page

paperoffice.ai/l/claude



- 1 **Demo:** in Claude, connect PaperOffice, choose "Try the demo" on the connection page and ask a question.
- 2 **Your own account:** on app.paperoffice.ai, create a Workspace and upload a test package, for example the one from the guide "Detecting Invoice Fraud".
- 3 **Limit:** create a group with only this Workspace, "View + Download", plus a group token.
- 4 **Connect:** paste the group token on the connection page, "Connect my account".
- 5 **Ask:** "Which documents in this Workspace are in quarantine, and why?"
- 6 **Block:** set the group token to "Blocked" and ask the same question again.

HOW YOU CAN TELL

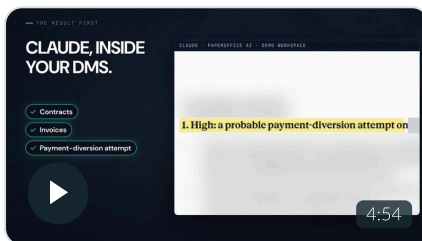
The assistant names only documents from the allowed Workspace. After blocking, it gets no more answers from PaperOffice.

Find out the cost of the test on our pricing page: paperoffice.ai/en/pricing

15 · VIDEOS ON THE TOPIC

Prefer watching? Films about Claude, ChatGPT and MCP.

Short films on paperoffice.ai. Scan the QR code with your phone camera or open the link.



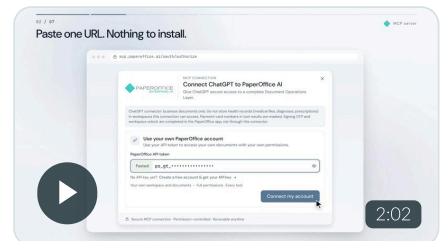
Claude Demo

From setup to result.
paperoffice.ai/l/claude



Connect ChatGPT

Set up PaperOffice in ChatGPT.
paperoffice.ai/l/chatgpt-setup



MCP for Developers

Paste the server URL, no installation.
paperoffice.ai/l/developer-mcp



MORE IN THE ACADEMY

You can find all lessons and webinars at paperoffice.ai/l/academy, sorted by topic from the first Workspace to integration.

16 · A SAFE ASSISTANT IN FIVE DAYS

Start with one team. Then group by group.

To get started, all you need is one team, one Workspace, one group and one group token.



1

Day 1 • Purpose

Decide which team wants to ask which questions and which Workspaces that requires.

2

Day 2 • Group and key

Create a group with a whitelist, right "View + Download", group token with an expiry date.

3

Day 3 • Connect

Connect Claude or ChatGPT, allow reading tools, set writing tools to approval.

4

Day 4 • Questions

Ask ten real questions from everyday work and check every answer against the document.

5

Day 5 • Rules

Put in writing who creates keys, who blocks them and what an assistant may write.

MEASURE THESE FOUR VALUES

Without download

Share of questions answered without downloading

Correct

Share of answers that hold up when checked against the document

Time per question

From the question to the checked answer

Keys with expiry

Share of keys with "Valid until"

Measure the same values once by hand beforehand; only the comparison shows the effect.

17 · CHECKLIST AND START

Before you expand.

- ☐ It is decided which teams use which assistant.
- ☐ Each team has a group with a whitelist and its own group token.
- ☐ No assistant group sees sensitive Workspaces.
- ☐ Every key has an expiry date.
- ☐ Reading tools run freely; writing and deleting tools only with approval.
- ☐ For plain information, the assistant group has the right "View + Download".
- ☐ It is decided who blocks a key when someone leaves the team.
- ☐ Ten real questions have been asked and checked against the document.

GET STARTED NOW

Create an account, create a key, connect Claude or ChatGPT. Start free with the Free plan, app.paperoffice.ai no credit card required.

READ MORE**SOLUTION**

PaperOffice in Claude

SETUP

PaperOffice in ChatGPT

DEVELOPERS

The PaperOffice MCP server

QUESTIONS ABOUT THE GUIDE?

Write to us if you have questions about setup or about rights and keys.

paperoffice.ai/contact

As of October 2026. Images from the app are sourced from a test account. The Claude views are recreated with the real labels, tool names and test documents. Claude is a product of Anthropic, ChatGPT a product of OpenAI, Cursor a product of Anysphere. All examples, companies, names and values in this guide are fictional. PaperOffice, paperoffice.ai.