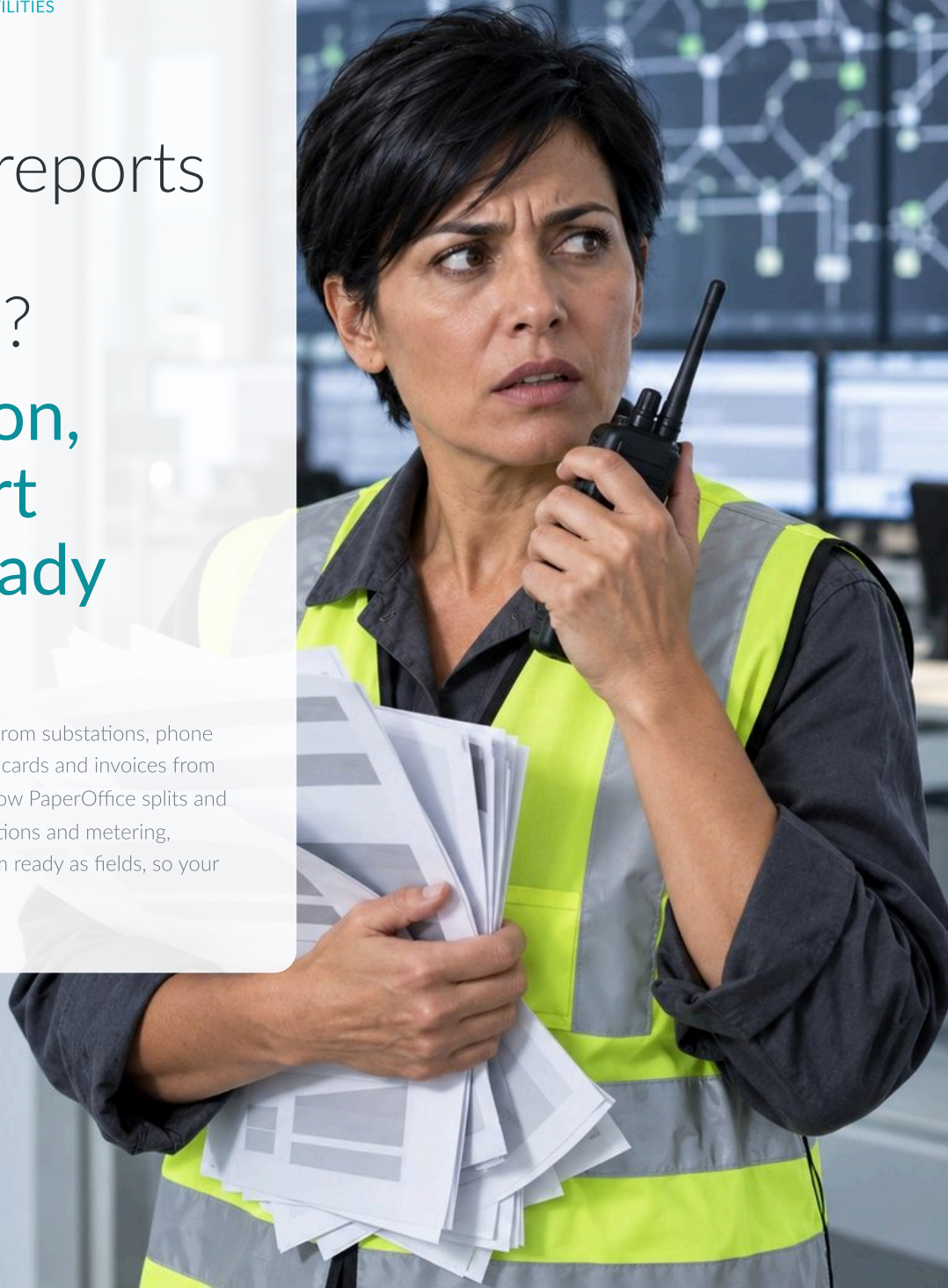


Retyping
inspection reports
from your
substations?

**From now on,
every report
arrives already
read.**

Maintenance and inspection records from substations, phone photos from field staff, meter reading cards and invoices from service providers. This guide shows how PaperOffice splits and reads the documents from grid operations and metering, handwriting included, and makes them ready as fields, so your team reviews instead of retyping.



TRY IT YOURSELF IN 45 MINUTES

One week of grid operations in six files: a batch scan of station records, a phone photo of an inspection record, the reading cards of one round, a grid usage invoice and a maintenance invoice that arrives by email and by mail. Includes a test package to follow along.

WHY THIS GUIDE

Time isn't lost at the substation. It's lost retyping.

Technicians inspect substations, note findings by hand and photograph what stands out. Before anyone in the grid office can assess a defect, someone has to sort the paper first.



In many grid operations, the week ends with a stack of paper. Maintenance records from the substations, reading cards from the round, photos from work phones and invoices from service providers are sorted, retyped and matched to the right task.

This guide shows how PaperOffice takes over the sorting and retyping: one Workspace per area, several ways in for paper and photos, a Split Agent for batch scans and IDP Agents that deliver station, inspection date, condition and defects as fields. With our test package, you can try the process yourself in 45 minutes.

Daniel Schönland

Founder and CEO, PaperOffice



WHO THIS IS FOR

Grid operations

You are responsible for substations and lines and need findings fast, legible and per station.

Maintenance

You maintain and inspect on site, often by hand and without cell coverage in the switch room.

Metering

You take over meter readings and check invoices from service providers and upstream suppliers.

WHAT YOU CAN DO AFTERWARD

Create Workspaces for inbox, stations, meter reading and invoices, bring in records by smartphone, scanner and email, split batch scans, have handwriting read, get station, inspection date, condition and defects as fields, review missing values and export everything.

OVERVIEW

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AT A GLANCE

- Inbox, stations, meter reading and invoices each get a Workspace with its own AI-DMS tier and its own rights.
- Records arrive via Mobile App, scanner or upload, invoices via an email connector. The Split Agent splits batch scans into single records and cards.
- AI-DMS Ultra also reads handwriting, signatures and stamps. An IDP Agent pulls station, inspection date, condition and defects as fields, each with its source.
- If a required value is missing, the “IDP Review” view shows the document. With a review queue, a review task is created as well.
- Your systems for the grid, maintenance and billing stay in the lead. PaperOffice delivers the fields via export, REST API or MCP.

01 · FRIDAY IN THE GRID OFFICE

A week of inspections. One stack on the desk.

Friday, 2:30 p.m. Katrin Vogt, grid engineer at Stadtwerke Talbrück, has the week's documents in front of her: five stations, one reading round and two invoices.



The technicians filled in the maintenance records for the stations “Am Wasserturm”, “Gewerbegebiet Nord”, “Birkenallee” and “Schulstraße” by hand, then scanned them in the grid office as one stack, with a blank page in between. A technician photographed the inspection record of the station “Lindenweg” with his work phone. On top of that come the reading cards of round 17.

The mailbox holds the invoice from the maintenance contractor, and the same invoice also came by mail. And one record has no inspection date, which easily slips through when retyping.

THE REAL HURDLE

Your team can only assess a defect once every record is separate, legible and comes with station and date. Most of the time is lost before that point.

02 · WHAT HOLDS UP RECORDS IN GRID OPERATIONS

Four time sinks. Each one small on its own.

Hardly any record is difficult. The time goes into the fact that they arrive handwritten, bundled and through many channels.

Handwriting from the substation

Findings are noted on site, often under time pressure. A seven looks like a one, and a forgotten date shows up only later.

Everything in one scan

Field staff scan the week's records as one PDF. Someone has to match the pages to the stations again.

Many channels

Paper in the grid office, photos on work phones, invoices in a shared mailbox. Each channel lands somewhere else, and none of it is read.

Where is the defect?

Whether a station has a defect only becomes clear once you open every record and read it line by line.

TIME SINK	HOW PAPEROFFICE HELPS	IN THE TEST PACKAGE
Handwriting	AI-DMS Ultra reads handwriting, an IDP Agent turns it into fields	5 handwritten records
Everything in one scan	The Split Agent splits the stack, blank pages drop out	6 pages, 4 records, 1 blank page
Many channels	Mobile App, scanner, upload and email connector deliver into the Workspaces	6 files, 4 Workspaces
Where is the defect?	"Condition" field, "Defects" table, "IDP Review" view for missing values	1 record without inspection date

The test package is built so that every function becomes visible. All companies, stations, names and values are fictional.

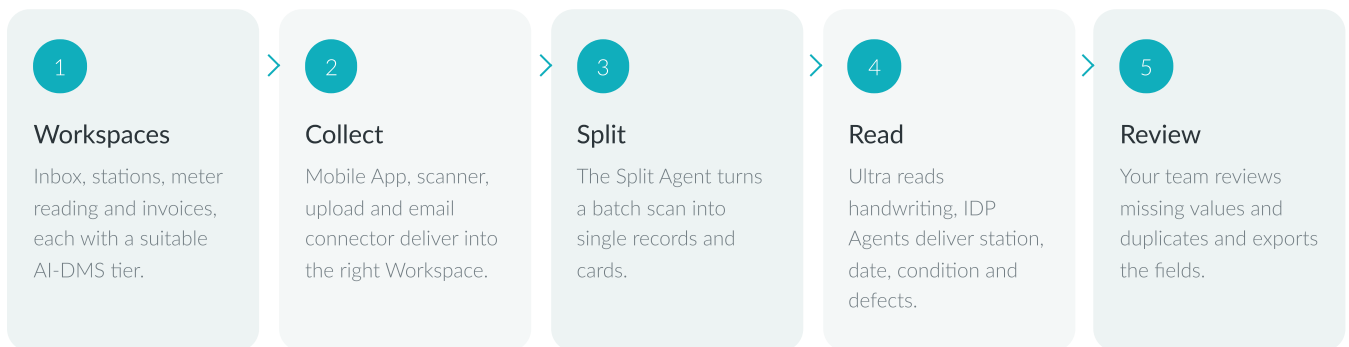
WHAT REMAINS IN YOUR HANDS

The expert assessment of defects, measurements and meter readings, the approval of invoices and the work in your grid and billing systems. PaperOffice prepares the documents and shows what is missing.

03 · THE PROCESS AT A GLANCE

Five steps. From the stack to the handover.

Every record follows the same path, whether scanned, photographed or sent by email.



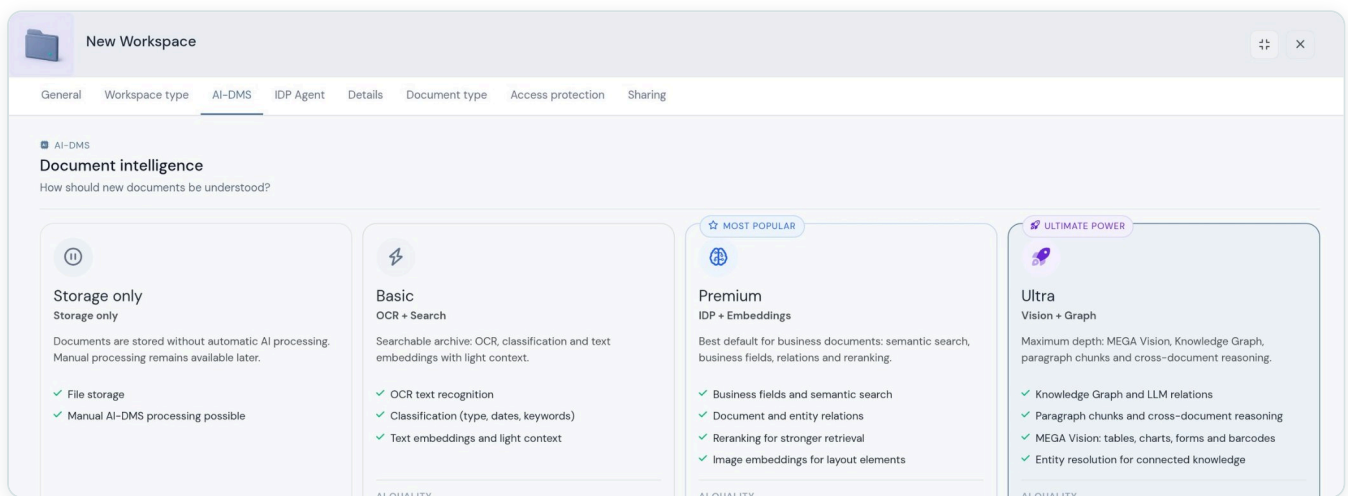
STEP	WHAT PAPEROFFICE DOES	WHAT YOUR GRID OPERATIONS DECIDE
Workspaces	separates areas with their own tier and rights	names, areas and team rights
Collect	accepts photos, scans, files and emails	which channels field staff and office use
Split	detects where a record ends and removes blank pages	rule per stack type and target Workspace
Read	type, handwriting, fields with their source	which fields each record delivers
Review	shows missing required values and possible duplicates	who reviews and where exports go



04 · ONE WORKSPACE PER AREA

Four Workspaces. Each with its own tier.

Under **Document AI** > **Workspaces**, use “Create New Workspace” to set up one Workspace per area. In the “AI-DMS” tab, you choose how deeply new documents are read.



1 **Stations on Ultra.** For handwritten records, choose the Ultra tier in the “AI-DMS” tab. It also reads handwriting, signatures and stamps. Name and type, such as “Documentation”, are set under “General”.

WORKSPACE	TYPE	AI-DMS	USED FOR
Grid · Inbox	Filing	Basic	batch scans from the grid office, kept as originals
Grid · Station records	Documentation	Ultra	maintenance, inspection and measurement records, photos from substations
Metering · Meter reading	Department	Ultra	reading cards and meter photos
Grid · Invoices	Accounting	Premium	invoices from service providers and upstream suppliers

Business type

Under “Workspace type”, Business adds a trash, access protection and external sharing.

Rights per area

Group rights apply per Workspace: view and download, plus upload or full access.

One agent per Workspace

An agent set in the “IDP Agent” tab runs on every new document. That is why each form type gets its own Workspace.

05 · COLLECTING RECORDS AND PHOTOS

Three ways in for paper and photos. Each into the right Workspace.

Field staff photograph with the Mobile App, the grid office scans via a scanner endpoint, and a connector collects invoices from the mailbox. In the Workspace, **Add document** offers the tabs “File”, “Mobile devices” and “Scanner”.

Pair the Mobile App and send

Pair once on the computer in the Security Center with “Add mobile device”. Then shoot via “Add”, several pages in “Batch” mode, tap “Send”, pick the Workspace under “Target Workspace” and tap “Upload”.

No cell coverage in the switch room

Without a connection, the app keeps the scan on the device and uploads it as soon as the connection is back. For dark rooms, there is the flash.

Scanner in the grid office

Under **Document AI** > **Storage Mounts**, provide a scanner endpoint and enter /inbox as the target folder on the device. New scans wait in the “Scanner” tab.

INVOICE MAILBOX VIA CONNECTOR

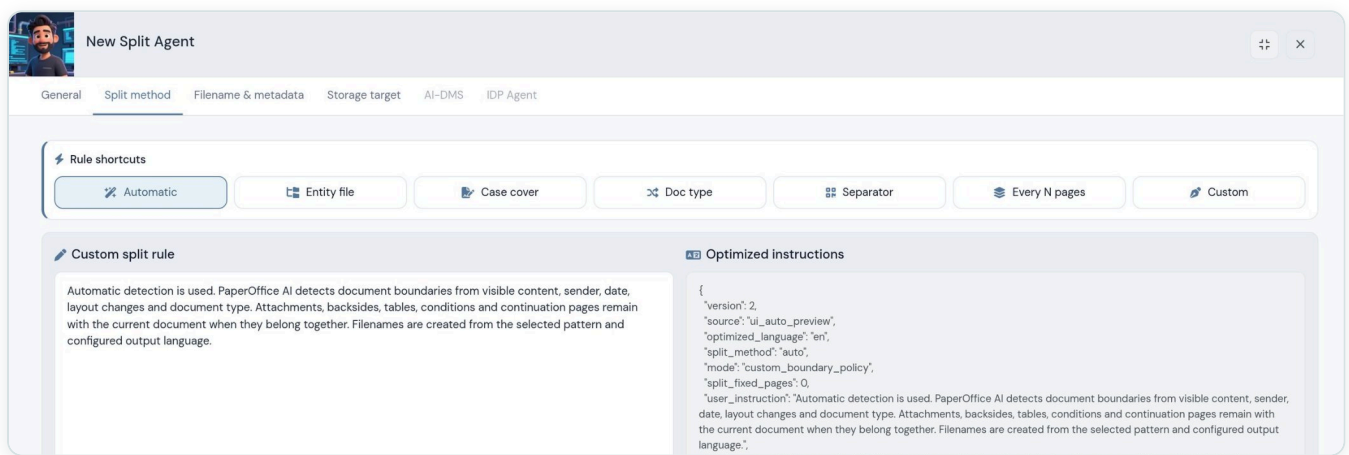
Create an “Email (IMAP)” Storage Mount as an import source, then under **Document AI** > **Connectors** use “Create connector” and pick the target Workspace “Grid · Invoices”. The connector collects unread emails, and every attachment becomes a document of its own.



06 · SPLITTING BATCH SCANS

One scan with six pages. Four records afterward.

Create one Split Agent per stack type under [Document AI](#) > [Split Agent](#) > [Create Split Agent](#). The “Split method” tab holds the rule, the “Storage target” tab the Workspace for the parts.

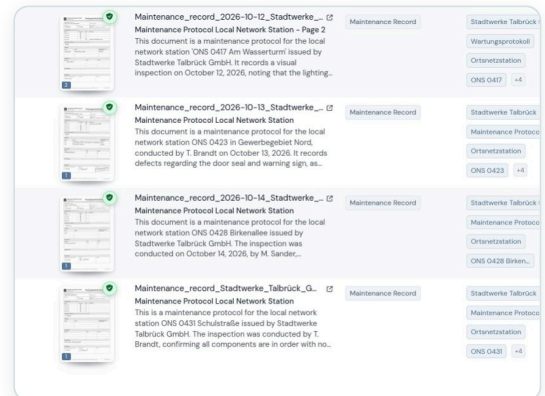


1 **Rule shortcut “Automatic”.** PaperOffice AI detects boundaries from content, sender, date, layout changes and document type. You pick the tier, such as Premium, in the “General” tab. In the test, the same rule also split the reading cards cleanly, one card per document.

1 **Pick the target:** in the “Storage target” tab, the “Existing Workspace” “Grid · Station records” or “Metering · Meter reading”.

2 **Start:** select the stack in the inbox, [Actions](#) > [Agents & workflows](#) > [Split](#), then “Run via Split Agent”.

3 **Result:** every record becomes a document of its own in the target Workspace and runs through AI-DMS Ultra and the assigned IDP Agent there. The stack stays in the inbox.



2 **Four parts** from six pages, the blank page is gone.

GOOD TO KNOW

The Split Agent detects blank pages from the page image. Pages with a stamp, signature or note stay. If you pick a review queue under “Review uncertain boundaries”, a part with an uncertain boundary goes there with the status “to review”. If your form carries a form number, PaperOffice may read it as the document number and show records of the same form type as “Possible Duplicate”. “Not a duplicate” hides the note.

07 · WHAT ULTRA READS FROM HANDWRITING

Noted by hand. Readable as text.

In a Workspace with AI-DMS Ultra, every record gets a type, a descriptive name and a summary. The **Overview** tab shows what was handwritten, signed or stamped.

Bestell	In Ordnung	defekt	Bemerkung
Gebäude / Tür	☐	☒	Dichtung, Warnschild
Schaltanlage	☒	☐	
Transformator	☒	☐	
Beleuchtung	☒	☐	

2 Zustand der Station (eintragen: in Ordnung / Mangel / außer Betrieb)

Mangel

3 Mängel

Bestell	Befund	Dringlichkeit (niedrig / mittel / hoch)
Tür	Türdichtung undicht, Feuchtigkeit im Schalraum	hoch
Tür	Warnschild verblasst	niedrig

4 Messwerte

Messung	Wert	Einheit
Erdungswiderstand	2,1	Ω

5 Bemerkung

6 Abschluss

Name Masseur (Druckbuchstaben)	Unterschrift	Stempel
T. Brandt	<i>T. Brandt</i>	STADTWERKE TALBRÜCK NETZBETRIEB

Stadtwerke Talbrück GmbH · Netzbetriebs Strom · Am Umpannenwerk 4 · 62480 Talbrück · Netzleitstelle 030 23325 400 · Formblatt MB-WP 01

Handwritten notes
Handwritten text found in the document

ONS 0423 Gewerbegebiet Nord
13.10.2026
T. Brandt
Dichtung, Warnschild
Mangel
Türdichtung undicht, Feuchtigkeit im Schalraum
hoch
Warnschild verblasst
niedrig
Erdungswiderstand
2,1

Signatures
Signatures found in the document

- The record "Gewerbegebiet Nord" from the batch scan. On the left the original, on the right "Handwritten notes" with every handwritten entry, including the finding on the door seal. Below follow "Signatures" and "Stamps".

Types from the catalog

Maintenance Record, Measurement Record, Inspection Report and Test Report are in the type catalog, as are Invoice and Photo.

Text in search

The text that was read is then part of search. A station number also finds scans and photos.

Catch up on older scans

Select documents, [Actions](#) →
[Agents & workflows](#) →
AI-DMS and choose Ultra.



08 · AN IDP AGENT FOR STATION RECORDS

Your fields, in your words. Set up once.

Select a record, [Actions](#) > [Agents & workflows](#) > [IDP](#), “Create new agent” and pick the “Free template (Vision Pro)”: a custom schema for handwriting, tables, checkboxes and stamps.

1 The “Station record” agent. Each field has a label, a field type and a description in your own words. In each field, “Behavior when value is missing” sets what happens if the value is missing: “Required — HITL review” for station and inspection date.

FIELD	FIELD TYPE	DESCRIPTION IN YOUR OWN WORDS
Station	Text	number and name of the station in the header, such as ONS 0417 Am Wasserturm
Inspection date	Date	date of the inspection, entered by hand
Inspector	Text	name of the technician next to the signature
Condition	Selection	allowed values: OK, defect, out of service
Defects	Table	one row per defect with component, finding and urgency
Measurements	Table	one row per measurement with name, value and unit

- 1 **Model:** The template starts with Ultra Pro Max. Under “Change AI model”, match the tier to the number of fields and pages.
- 2 **Test:** “Start full test run” shows value, page and source location per field, 3, 5 or 10 times in a row if you like.
- 3 **Assign:** “Save and close”, then under [Options](#) > [Edit workspace](#) > [IDP Agent](#) select the agent for “Grid · Station records”.

09 · DEFECTS AND MEASUREMENTS AS FIELDS

Every defect a row. Every value with its source.

Open the **Data Fields** tab in the record. If the agent is assigned to the Workspace, the values appear there after processing. For single documents, there is "Apply Agent".

1 Sichtprüfung (zutreffendes ankreuzen)

Bauteil	In Ordnung	defekt	Bemerkung
Gebäude / Tür	☐	☒	Dichtung, Warnschild
Schaltanlage	☒	☐	
Transformator	☒	☐	
Beleuchtung	☒	☐	

2 Zustand der Station (eintragen: In Ordnung / Mangel / außer Betrieb)

Mangel

3 Mängel

Bauteil	Befund	Dringlichkeit (niedrig / mittel / hoch)
Tür	Türdichtung undicht, Feuchtigkeit im Schalraum	hoch
Tür	Warnschild verblasst	niedrig

4 Messwerte

Messung	Wert	Einheit
Erdungswiderstand	2,1	Ω

5 Bemerkung

6 Abschluss

Name Monteur (Druckbuchstaben): T. Brandt
Unterschrift: T. Brandt
Stempel: STADTWERKE TALBRÜCK NETZBETRIEB

Condition: defect

Inspection date: 10/13/2026

Inspector: T. Brandt

Station: ONS 0423 Gewerbegebiet Nord

Defects TABLE AI 2 rows · 3 Columns

Copy for Excel

	Position	Description	Urgency
1	Tür	Türdichtung undicht, Feuchtigkeit im	hoch
2	Tür	Warnschild verblasst	niedrig

1 The record "Gewerbegebiet Nord". On the left the original, on the right condition "defect", inspection date, inspector and station, below it the "Defects" table with door seal and warning sign. Next to most values is the snippet it was read from. The agent names the table columns itself, here "Position", "Description" and "Urgency".

Condition: defect

Inspection date: 10/15/2026

Inspector: T. Brandt

Station: ONS 0442 Lindenweg

Defects TABLE AI 1 rows · 3 Columns

Copy for Excel

	Position	Description	Urgency
1	Lüftung	Lüftungsgitter verstopft (Laub)	mittel

2 The phone photo from the station "Lindenweg", read by the assigned agent.

Photos like scans

The same agent reads the phone photo. The test run in the editor uses the agent's sample record. Check your own photos and hard-to-read scans in the "Data Fields" tab after uploading.

Copy for Excel

The button above a table copies all rows, such as the defect list for maintenance.

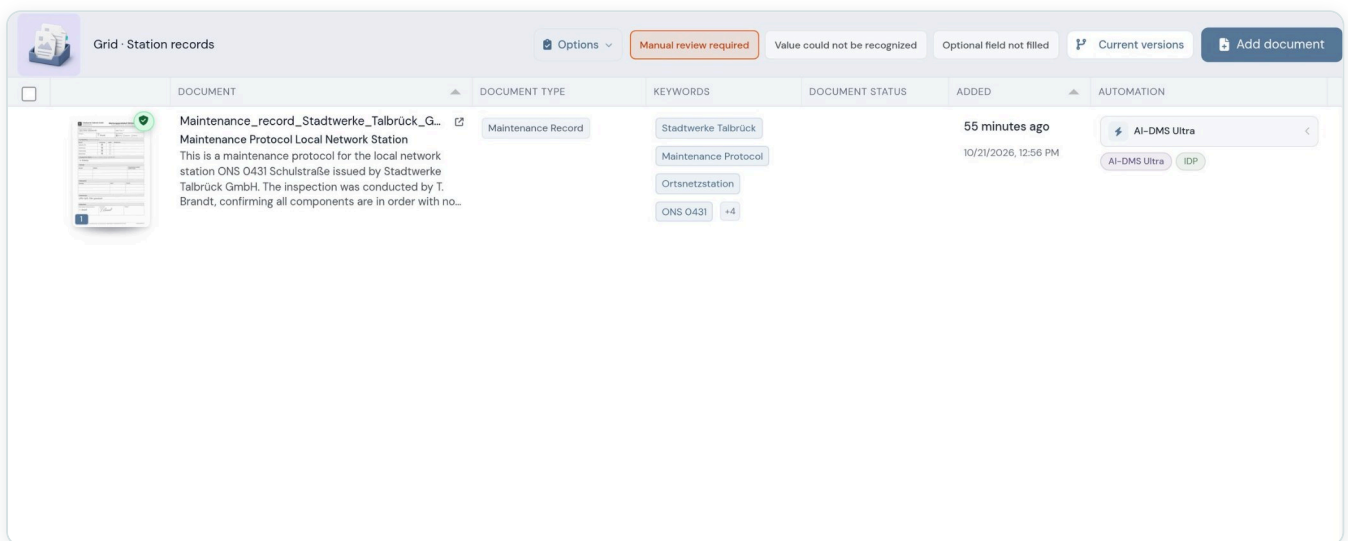
One form type, one agent

If your grid operations use a separate form for earthing measurements, it gets its own agent and its own Workspace.

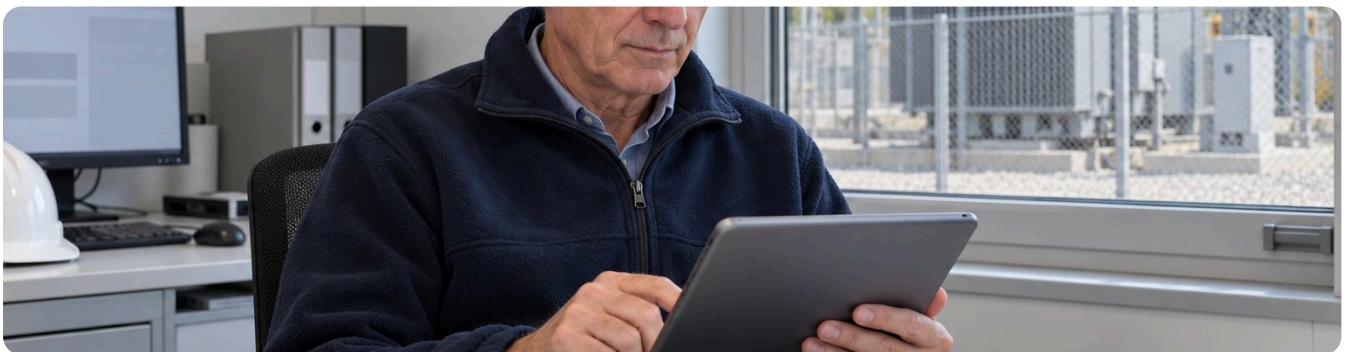
10 · REVIEWING MISSING VALUES

What's missing sits in one view. The original right next to it.

If a required value such as the inspection date is missing, PaperOffice marks the field as missing. Under [Options](#) > [Configure view](#), "IDP Review" shows all documents with missing or incomplete IDP fields.



- 1 The record "Schulstraße" without inspection date. The filters "Manual review required", "Value could not be recognized" and "Optional field not filled" narrow down the list.



A review task for the team

Under [Workflow AI](#) > [HITL Agents](#), create a queue with "New HITL Agent" and pick it in the agent under "Review queue when required fields are missing". If a required value is missing, a task is created. Review tasks are included in the Professional plan.

Settle it against the original

Open the document, check the original and ask the technician. Your team decides who checks the view daily and who assesses unusual values.

11 · READING CARDS AND INVOICES

Meter reading as a field. Duplicate invoice spotted.

The same pattern applies in metering and invoice review: cards go through the Split Agent into meter reading, invoices through the connector into “Grid · Invoices”.

The “Meter reading card” agent

Fields meter number, meter reading, reading date, metering point and remark, the reading set to “Required — HITL review”. A card noted “meter not accessible” then shows up in “IDP Review”.

Two templates for invoices

“Utility Bill” for invoices with meter data, “Extract Invoice (Full)” for all others, with line items as a table.

Überlandwerk Mittelhau GmbH · Leistungsbereich 12 · 62430 Mittelhau

Stadtwerke Talbrück GmbH
Netzbetrieb Strom
Am Umspannwerk 4
62480 Talbrück

Rechnungsnummer: NE-2026-09-4471
Rechnungsdatum: 05.10.2026
Kundennummer: NK-10388
Abrechnungszeitraum: 01.09.2026 bis 30.09.2026
Fällig am: 19.10.2026
Seite: 1 von 2

Netzentgeltabrechnung September 2026

Sehr geehrte Damen und Herren,

für die Entnahme aus unserem Mittelspannungsnetz an der Übergabestelle UW Talbrück-Ost berechnen wir Ihnen für den Abrechnungszeitraum 01.09.2026 bis 30.09.2026:

Sparte	Strom
Übergabestelle	UW Talbrück-Ost
Zählernummer	UW-EO-01
Tarif	Netzentgelt Mittelspannung
Zählerstand alt (01.09.2026, 00:00 Uhr)	18.204.511 kWh
Zählerstand neu (30.09.2026, 24:00 Uhr)	19.402.876 kWh
Verbrauch	1.198.365 kWh
Höchstleistung im Abrechnungszeitraum	2.140 kW

Pos.	Bezeichnung	Menge	Preis	Betrag
1	Grundpreis Netzentgelt Mittelspannung, September 2026	1 Monat	1.250,00 €	1.250,00 €
2	Arbeitspreis	1.198.365 kWh	0,0182 €/kWh	21.810,24 €
3	Leistungspreis	2.140 kW	7,15 €/kW	15.301,00 €
Nettobetrag				38.361,24 €

Meter number: UW-EO-01

Payments received: 0

Previous balance: 0

Previous reading: 18204511

Rate plan: Netzentgelt Mittelspannung

- The grid usage invoice from the test package. On the left the meter data, on the right “Utility Bill” fields such as meter number and previous reading. It also reads the utility company, current reading, usage, unit, rate plan and the base, energy and demand charges.

Possible Duplicate

From AI-DMS Premium, PaperOffice checks whether the content or the issuer's document number already exists in the account. A match appears below the action bar, with a reason such as “Same Document Number” and “Open Original”.

You decide

If it is the same invoice, release only one for payment in your accounting system. Otherwise, “Not a duplicate” hides the note.

Possible Duplicate: This document likely already exists: "Rechnung_SD-2026-0815.pdf" in "Grid · Invoices" from 10/21/2026.

Same Document Number | Same Issuer | Same Amount

Open Original | Not a duplicate

Overview | Properties | Data Fields | Storage Paths | Activities | Audit | Revisions

Connections

Recalculate graph relations | Optimize embedding ranking

Refresh semantic neighbors | Check process groups

Business partners

Stationsdienst Hollerbeck GmbH
Organization: publisher

Extracted deadlines

Zahlungsfrist: 2026-11-08

Reminders for deadlines are off. Turn on (paid)

Possible duplicates

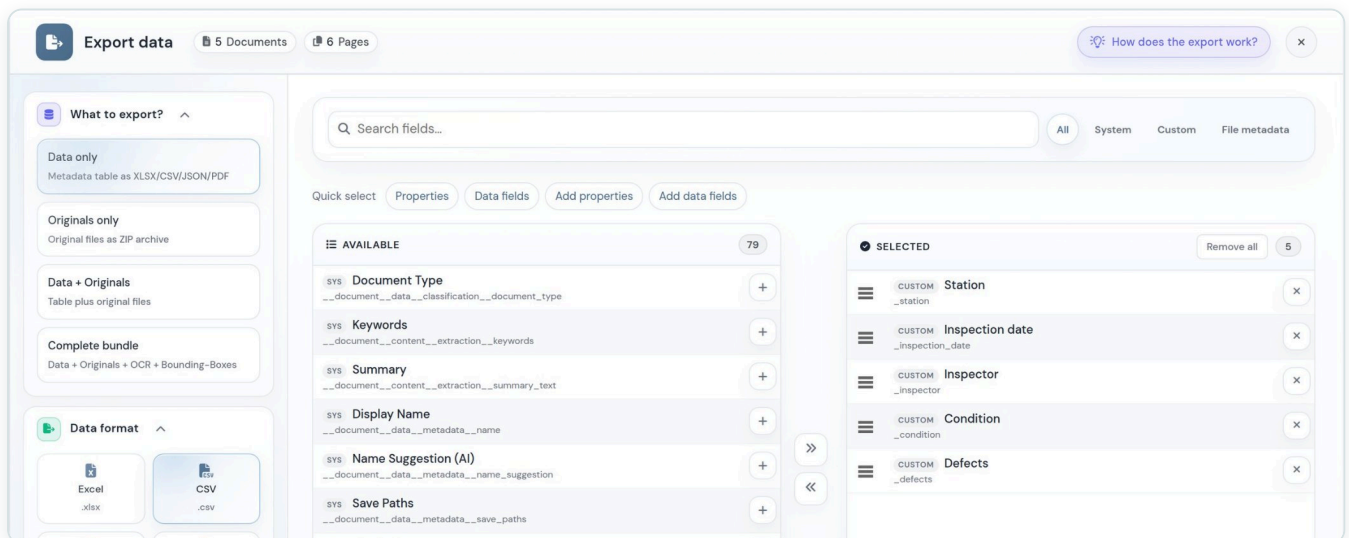
- The same invoice, first by email, then by mail.

12 · HANDOVER TO YOUR SYSTEMS

Your systems stay in the lead. The fields are ready to pull.

Grid documentation, maintenance and billing stay in your systems. PaperOffice keeps records, cards and invoices ready with their fields. Your team pulls them via export, REST API or MCP into the systems where it keeps working.

PATH	HOW IT WORKS	GOOD FOR
Export data	Actions › Share & export › Export data , “Data only” as XLSX, CSV, JSON or PDF	defect lists, readings for billing
Copy for Excel	button above tables such as the defects	manual reconciliation
REST API	upload documents, start agents, such as POST /documents/idp-agent-run, fetch fields, with an API key	connecting maintenance and billing
MCP	AI assistants query the documents with the rights of the connected key	questions about a station or a meter



- 1 The week as a table. Select all records in the Workspace, choose “Data only” and CSV in the “Export data” dialog, clear the “Selected” list with “Remove all”, add Station, Inspection date, Inspector, Condition and Defects via “Search fields...” and “+”, then “Start export”.

ONE PROFILE PER RECIPIENT

“Save current configuration as profile” keeps fields, mode, format and file name schema, such as one profile for the maintenance defect list and one for the readings. Profiles are stored in your browser.

Seven questions before the first stack.



Does PaperOffice replace our grid or billing systems?

No. Stations, meters, contracts and billing stay in your systems. PaperOffice reads the documents before them. You pull the fields via export or REST API, and AI assistants ask over MCP.

What happens to photos from a substation without cell coverage?

The Mobile App keeps them on the device and uploads them as soon as there is a connection again. They then land in the selected Workspace.

Does PaperOffice read handwriting?

Yes, at the Ultra tier, including signatures and stamps. A test run with your own records shows whether your agent reliably reads your forms and handwriting.

Do we need a template for every form?

You describe the fields once in your own words or have them suggested from a sample record. Each form type gets its own agent.

How do we find every record for a station?

Enter the station number in the search bar. Search also finds it in scans and photos and highlights the spot on the page, in the Workspaces you have rights to.

What happens to invoices that arrive twice?

From AI-DMS Premium, the document shows "Possible Duplicate" with a reason, such as the same document number from the same issuer. You decide before anything is paid twice.

What does it cost?

Billing is based on usage, depending on the tier. The tiers and prices are on the pricing page: paperoffice.ai/en/pricing.

14 · TRY IT YOURSELF IN 45 MINUTES

Download the test package. Play through a week of grid operations.

Six invented files from a German municipal utility, in German like real field records, show the whole path: from the batch scan to the duplicate invoice.

ENERGY AND UTILITIES TEST PACKAGE

Six files and a guide (README.txt)

Scan_Stationen_KW42.pdf batch scan, 6 pages with 4 records and 1 blank page
Foto_Protokoll_ONS-0442.jpg phone photo of an inspection record
Scan_Ablesekarten_Tour-17.pdf 5 reading cards, one without a reading
Netzentgelt_Mittelgau_2026-09.pdf grid usage invoice with meter data
E-Mail_Hollerbeck_SD-2026-0815.eml email with a maintenance invoice attached
Post_Hollerbeck_SD-2026-0815.pdf the same invoice as a scan of the paper copy
paperoffice.ai/downloads/paperoffice-ai-test-package-energy-utilities.zip



- 1 **Create Workspaces:** at app.paperoffice.ai, the four Workspaces from Chapter 04, stations and meter reading with AI-DMS Ultra.
- 2 **Create agents:** "Station record" and "Meter reading card" (Chapters 08 and 11), each assigned to its own Workspace, plus, in "Grid · Invoices", an agent from the "Utility Bill" template (Chapter 11), started on the grid usage invoice with "Apply Agent".
- 3 **Split:** upload both scans to the inbox and split them into stations and meter reading with the Split Agents (Chapter 06).
- 4 **Photo and invoices:** the photo via the Mobile App into stations, the three invoice files into "Grid · Invoices", the email first.
- 5 **Review:** look at the data fields, the "IDP Review" view and the "Possible Duplicate" note (Chapters 09 to 11).

FILE	WHAT TO LOOK FOR
Batch scan stations	4 documents, the blank page is gone, the record "Am Wasserturm" keeps both pages
Phone photo ONS 0442	condition "Defect", "Defects" table with the ventilation grille
Reading cards round 17	5 cards, one of them in "IDP Review" because the reading is missing
Grid usage invoice	"Utility Bill" template: meter number, readings, usage in kWh
Email and mail scan	"Possible Duplicate" with "Same Document Number" on the mail scan
Record "Schulstraße"	in "IDP Review" because the inspection date is missing

All companies, stations, names, addresses, meter numbers, bank details and values in the test package are fictional. The cost of the test is shown on the pricing page: paperoffice.ai/en/pricing.

15 · [READ MORE: DATASHEETS AND SHORT GUIDE](#)

More on every building block. As a datasheet to take along.

Every module in this guide has a datasheet with features, click paths and technical details. The short guide sums up the topic on eight pages, for example for the grid team meeting.

SHORT GUIDE ENERGY AND UTILITIES

Reading cards and invoices on eight pages

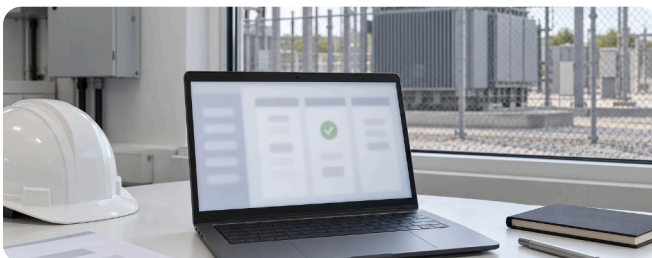
The problem, the path with PaperOffice, the click paths, an example from a municipal utility, a checklist and the most common questions.

paperoffice.ai/downloads/paperoffice-ai-short-guide-branche-energie.pdf



DATASHEET	WHAT IT COVERS	CHAPTER
Workspaces	types, AI-DMS per Workspace, access protection and rights	04
Mobile App	pairing, camera scanner, offline queue	05
Network Scanner	scanner endpoint via SFTP, target folder /inbox	05
Connectors	email mailbox and folders, schedule, target Workspace	05
Split Agent	rules, tiers, blank pages, uncertain boundaries	06
AI-OCR	text with position, tables and handwriting in Ultra	07
Classification	document types, summary, custom types	07
IDP Agent	fields in your own words, templates, test run, review	08 to 11
Smart Search	full text, OCR text from scans, matches in the document	13

The names in the table are linked in the PDF. All datasheets are also available in German.



16 · YOUR FIRST RESULT IN FIVE DAYS

Start with one week. Then every week after.

To get started, the records of one week, one reading round and the invoice mailbox are enough.

1

Day 1 · Workspaces

Create inbox, stations, meter reading and invoices, set AI-DMS tiers and group rights, choose one naming scheme for all areas.

2

Day 2 · Channels

Set up the scanner endpoint in the grid office, pair the field staff's work phones, connect the invoice mailbox via connector.

3

Day 3 · Split stacks

Create the Split Agents "Split station records" and "Split reading cards" and try them on a real stack.

4

Day 4 · Agents

Test "Station record" and "Meter reading card" on real records, including hard-to-read ones, choose required fields and a queue, assign them to the Workspace.

5

Day 5 · Review routine

Decide who checks "IDP Review" daily, who settles duplicates and which export profiles maintenance and billing get.

MEASURE THESE FOUR VALUES

Records

records and cards per week
that arrive in the right
Workspace

Zero rework

share of documents that do
not appear in "IDP Review"

Time to handover

time from the scan to the
export to maintenance or
billing

Defects

records with condition
"Defect" per week, according
to the export



Measure the first week precisely. Only the comparison with the weeks after shows how much retyping goes away.

17 · CHECKLIST AND START

Before you expand.

- ☐ Inbox, stations, meter reading and invoices each have a Workspace with suitable rights.
- ☐ Stations and meter reading run on AI-DMS Ultra, invoices on Premium.
- ☐ The work phones are paired, the scanner endpoint and the invoice mailbox are set up.
- ☐ Records and reading cards each have a Split Agent with a target Workspace.
- ☐ The agents “Station record” and “Meter reading card” are tested on real forms and assigned.
- ☐ Station, inspection date and meter reading are required fields, and a review queue is selected.
- ☐ Someone checks “IDP Review” daily and watches for “Possible Duplicate” on the document.
- ☐ A run with the test package has been completed.

GET STARTED NOW

Create an account, set up the four Workspaces, upload the test package. Billing is based on usage; the pricing page lists the tiers.

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**QUESTIONS ABOUT THIS GUIDE?**

Contact us if you have questions about the setup or about your forms.

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As of October 2026. Screenshots are from a test account. All examples, companies, names, stations, meter numbers and values in this guide are fictional. PaperOffice, paperoffice.ai.