



SHORT GUIDE · INDUSTRY · EDUCATION AND RESEARCH

Checking application files for gaps by hand?

Every missing required detail becomes a review task.

Universities and research institutions manage applications, grant agreements, procurement and lab notebooks. This short guide shows how PaperOffice reads required details as fields, sends gaps to review and makes project files searchable by question. For admissions, grants office and institutes.

THE KEY POINT IN ONE SENTENCE

An IDP Agent reads the details every document must provide and sends gaps to review as a task. Grant files, procurement and lab notebooks sit per project and can be queried.

01 · THE PROBLEM

The pile grows each semester. Every file is checked one by one.

By the application deadline, files arrive by mail, upload and email, and each one is checked for required details. Alongside run grant agreements with reporting dates, procurement with quote, order and invoice, and handwritten lab notebooks. All of it should be findable when someone asks.

WHY IT HAPPENS

Deadlines pile up

Application deadline, funders' reporting dates and year-end closing often fall in the same weeks. Then the same team checks twice as many documents.

Every document looks different

Transcripts from other countries, grant agreements in English, forms with handwriting. Where a detail sits has to be searched again in every file.

Knowledge sits with people

What the cooperation agreement says about publication is often known only to whoever negotiated it. When the position changes hands, the search in the folder begins.

HOW YOU NOTICE IT

- A missing detail is noticed only when the admission letter is already being prepared.
- Reporting dates sit in a list that a single person maintains.
- For a funder's audit, quotes, order and invoice have to be gathered from everywhere.
- Lab notebook pages sit on the drive as images, their text invisible to search.
- The question "May we submit the manuscript?" travels by email through three departments.

02 · THE WAY WITH PAPEROFFICE

Define required details once. Check every document the same.

Application, grant agreement and procurement follow the same path: file separately, recognize the type, read required details, review gaps and query the project file. Every document goes through the same rules, no matter who is handling it.

1

File separately

Admissions, the grants office and each research project work in workspaces of their own. That way, applicant data is visible to those with permissions in admissions.

[MODULE: WORKSPACES](#)

2

Your own types, no training

For study application, funding decision or lab notebook, you create document types of your own with a short description. AI-DMS recognizes them next to contract, quote, order and invoice.

[MODULE: CLASSIFICATION](#)

3

Read and check required details

An IDP Agent reads details such as name, degree program, final grade or reporting date with their source. If a required field is missing, a task goes to the review queue.

[MODULE: IDP AGENT](#)

4

English and handwriting

AI-OCR works out the language of each page by itself. With AI-DMS Ultra, handwriting is read too, for example from lab notebooks, and the text goes into the search index.

[MODULE: AI-OCR](#)

5

Query the project file

Document Chat answers questions such as "What does the cooperation agreement say about publication?" and lists the documents it relies on.

[MODULE: DOCUMENT CHAT](#)

03 · IN THE APP

From the first file to the review queue.

This is how you set up the review of applications. You need a workspace with AI-DMS Premium and a few complete and incomplete application files as samples.

1

Create the type

Under **Document AI** › **Document Types**, create a new type "Study application" and describe in English how to recognize it. Later you assign the matching agent there.

2

Process the files

Under **Document AI** › **Workspaces**, open the Admissions workspace, upload files, select them and process them via **Actions** › **Agents & workflows** › **AI-DMS** with Premium. Type and dates then appear on the document.

3

Build the application agent

Select a file, then **Actions** › **Agents & workflows** › **IDP** and **Create new agent**. Create one field per required detail in your own words and choose **Required — HITL review** as the rule for a missing value.

4

Set the review queue

In the agent, choose the admissions queue under **Review queue when required fields are missing**. If a file lacks a required field, a task appears there, and the **IDP Review** view lists the files.

5

Check procurement

When order, delivery note and invoice with the same purchase order reference sit in the workspace, the **3-way match** shows whether all documents are there and the amount fits.

TIP FROM PRACTICE

Draw a clear line around your own type The catalog already has the type Job Application for job applications. In your type's description, state what sets a study application apart, such as degree program, semester and university entrance qualification.

04 · AN EXAMPLE

A university at the application deadline.



A university of applied sciences with 6,000 students accepts applications for master's programs for the winter semester. Admissions checks every file by hand for degree, grade and language certificate. Alongside, the grants office looks after several research projects with funders abroad.

BEFORE

- Every file is opened and read against a paper checklist.
- A missing language certificate is often noticed only shortly before the admission letter.
- The clerk puts transcripts from abroad aside until there is time.
- For every follow-up question she looks for the file on the shelf.

WITH PAPEROFFICE

- Files arrive as PDFs in the Admissions workspace and are recognized as study applications.
- The application agent reads degree, grade and language certificate with the source.
- If a required detail is missing, the file appears in the IDP Review view.
- She answers follow-up questions with search in the workspace, including text on scanned pages.

An example for illustration; the university and people are fictitious. Check with your own files whether every required detail is found, and settle who works on the review tasks.

05 · CHECKLIST

Before the next application deadline.

Ten points for admissions and the grants office to settle before you start.

- ☐ Admissions, grants office and projects have separate workspaces with their own group permissions.
- ☐ Study applications have a document type of their own, with a short description in English.
- ☐ Every required field in the agent has the rule **Required — HITL review**.
- ☐ The agent is tested with complete and incomplete application files.
- ☐ Orders, delivery notes and invoices of a project carry the same purchase order reference.
- ☐ The Admissions workspace is set to AI-DMS Premium.
- ☐ The list of required details is aligned with the admission regulations.
- ☐ A review queue is chosen, and someone is responsible for its tasks.
- ☐ Reporting dates from grant agreements sit on the contract as a field and as a task with a deadline.
- ☐ Lab notebook pages run with AI-DMS Ultra so their handwriting becomes searchable.

06 · FREQUENTLY ASKED QUESTIONS

What administration and institutes ask first.

Does PaperOffice check whether an application file is complete?

Per document: the IDP Agent reads the required details you define and reports each missing one as a review task. Review tasks come with the Professional plan. Your team decides on admission itself.

How do we keep reporting dates in view?

Read the dates as date fields of their own from the grant agreement. On the contract, add a task with a deadline and an assignee for each date on the **Activities** tab.

Do handwritten lab notebooks become readable?

With AI-DMS Ultra, PaperOffice reads handwriting too. The recognized text sits on the document and in search, so you find a measurement series by a keyword. Check hard-to-read pages against the scan.

Can PaperOffice read English grant agreements?

Yes. AI-OCR detects the language of every page, and the IDP Agent delivers project, grant amount and reporting dates in the output language you set. Longer passages go through AI Translation with your glossary.

Is a procurement fully documented?

If order, delivery note and invoice carry the same purchase order reference, the **3-way match** shows whether all three are there and the amount matches. Quotes and award notes sit in the same workspace, and the assessment under your procurement rules stays with you.

Who sees the applicant data?

Groups with permissions on the Admissions workspace, alike in list, search, chat and MCP. From Business, a password or SMS code also protects the workspace.

07 · HOW TO START

Start with the files of the next application deadline

Create an account at app.paperoffice.ai, set up an Admissions workspace and upload a few application files, including an incomplete one. Billing is based on usage, and prices are on the pricing page.

Collect the required details

Write down with admissions which details every file must contain and where they usually appear.

Test one agent

Build the application agent on five real files, two of them incomplete, and look at every task it creates.

Add the grants office

Once admissions runs smoothly, create workspaces for funded projects and read reporting dates and grant amounts from the agreements.

DATASHEETS ON THIS TOPIC

IDP Agent

paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf

Classification

paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf

AI-OCR

paperoffice.ai/downloads/paperoffice-ai-datasheet-ocr.pdf

Document Chat

paperoffice.ai/downloads/paperoffice-ai-datasheet-document-chat.pdf

Workspaces

paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf

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paperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf

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