



SHORT GUIDE · DOCUMENT TYPE · TECHNICAL DOCUMENTS

Hunting for specs in a pile of PDFs? Now every value comes with its exact location.

PaperOffice recognizes datasheets, manuals, drawings and test reports by type, reads text and tables and pulls your key values out as fields. Search and the document chat find the right passage. For maintenance, engineering, purchasing and quality.

THE KEY POINT IN ONE SENTENCE

AI-DMS sorts technical documents by type, an IDP Agent reads your key values with page and location, and search and the document chat take you straight to the right spot in the manual.

01 · THE PROBLEM

The answer is in the manual. The question is: on which page?

Datasheets, manuals, drawings and test reports come from many manufacturers, each with its own layout. They sit on network drives, in emails and in binders. Anyone who needs a tightening torque, an operating pressure or a spare part number opens one PDF after another and scrolls.

WHY IT HAPPENS

Every maker, a different layout

Key values sit in a table one time, in running text the next, or in the title block of a drawing. A fixed template per supplier can hardly keep up with new manufacturers.

Scattered storage

Manuals live on the drive, datasheets in the mailbox, test reports in binders. To search, you first need to know where a document is stored and what it is called.

Revisions overtake each other

A manufacturer sends a new edition, and the old one stays in circulation. Which version applies is often hard to tell from the file name.

HOW YOU NOTICE IT

- For a single value, you open several PDFs and scroll through them page by page.
- Colleagues ask where the manual for a particular machine is stored.
- Values from datasheets are typed by hand into maintenance plans or master data.
- Scanned legacy documents are missing from every result list of the drive search.
- Several files of the same datasheet are in circulation, and which version applies is unclear.

02 · THE WAY WITH PAPEROFFICE

Open it up once, then find exactly what you need.

PaperOffice brings your holdings into a workspace, recognizes the document type, reads text and tables and pulls out the key values you define. You find things through search or by asking the document chat.

1

Bring in your holdings

The import wizard brings ZIP archives, folders from a Storage Mount or a mailbox into a workspace, with a preview and duplicate check. Type plates come in through the Mobile App.

MODULE: [IMPORT & MIGRATION](#)

2

Recognize the document type

AI-DMS assigns each document a type, such as Datasheet, Manual, Technical Drawing, Test Report or Certificate. You describe your own types in words.

MODULE: [CLASSIFICATION](#)

3

Read text and tables

AI-OCR also reads scans and photos. In the Ultra tier, tables come back with rows and columns as structured data, and the language is detected per page.

MODULE: [AI-OCR](#)

4

Key values as fields

An IDP Agent reads your fields, such as part number, operating pressure or material, and tables row by row. Every value comes with its page and location in the original.

MODULE: [IDP AGENT](#)

5

Find and ask

From three words or a question, search also works by meaning and highlights the match. The document chat answers with the documents it found.

MODULE: [DOCUMENT CHAT](#)

03 · IN THE APP

Five steps in the app. From the drive to the value.

This is how you bring in technical documents, read key values automatically and find passages in manuals again. A workspace with AI-DMS is the foundation.

1

Import your holdings

Under **Document AI > Workspaces**, select the target workspace and choose **Actions > Import Documents**. Set the source, check the preview and start the import.

2

An agent for datasheets

Select a datasheet, create an agent under **Actions > Agents & workflows > IDP** and describe the fields in your own words. **Start full test run** shows each field's value, page and location.

3

Automatic per type

Under **Document AI > Document Types**, choose **Bind IDP Agent** for the Datasheet type. From then on, the agent reads every newly recognized datasheet after AI-DMS processing.

4

Ask across your holdings

Click **Ask Agent**, choose workspaces and ask, for example: "Which operating pressure applies to pump P-200?" The documents found appear below the answer.

5

File a new edition

In the document, open **Versions** and choose **Upload new version**. The previous version is kept, and a comparison shows changed pages and text similarity.

TIP FROM PRACTICE

Test your fields on a tough datasheet For your first agent, take a datasheet with a large table of values plus a scan. Repeat the test run several times: if the values stay the same, the agent is ready for your whole archive.

04 · AN EXAMPLE

One maintenance team, many makers, one archive.



A plastics processor with 120 employees runs injection molding machines, pumps and chillers from many manufacturers. Maintenance works with manuals, datasheets and test reports stored on a network drive, in mailboxes and in binders in the workshop.

BEFORE

- For tightening torques or oil volumes, the right manual first has to be found, then leafed through.
- The team types values from datasheets by hand into the maintenance plan.
- New editions of a manual sit next to the old ones on the drive.
- Scanned legacy documents are invisible to the drive search.

WITH PAPEROFFICE

- The archive was brought into a workspace with AI-DMS once, by import.
- An IDP Agent reads every new datasheet automatically, and the values go on as CSV.
- The technician asks the document chat and opens the document it names on a tablet.
- New editions sit as a version on the same document, and the old version is kept.

Made-up example for illustration. Test with your own datasheets which values are read reliably before any values go into master data or maintenance plans.

05 · CHECKLIST

Checklist for your technical documents

Use these points to check whether your technical documents are ready for search and automatic extraction.

- ☐ You know where manuals, datasheets, drawings and test reports are stored today.
- ☐ The fields are described in your own words, such as “operating pressure with unit”.
- ☐ Required fields are set, so missing values show up as review tasks.
- ☐ Group permissions per workspace are set: view, upload or full access.
- ☐ You have decided how key values reach your master data: by export or REST API.
- ☐ For each document type, it is clear which key values you need regularly.
- ☐ A test run with datasheets from several manufacturers and one scan has been done.
- ☐ Supplier documents and confidential drawings sit in separate workspaces.
- ☐ New editions are filed as a version on the existing document.
- ☐ For certificates, someone is assigned to keep an eye on expiry dates in the timeline.

06 · FREQUENTLY ASKED QUESTIONS

Frequently asked questions about technical documents

Do I need a template per manufacturer?

You describe the fields once in your own words, and the IDP Agent reads them from the content, even with a new layout. Fields can also be suggested from a selected sample document.

What happens if a value is missing?

You set that per field: required with review, default value or allow empty. With a review queue selected, a review task is created; review tasks are included in the Professional plan.

How do key values reach our master data?

As an export in JSON, CSV or Excel, with [Copy table for Excel](#) straight from the table, or via REST API with POST /documents/idp-agent-run. Via MCP, po_documents_idp_agent_run is available.

Do units and tolerances come along?

Describe the field accordingly, such as "operating pressure with unit". The test run shows each field's value, page and location, so you check against the original before the agent runs on your whole archive.

How do colleagues find the right spot in a manual?

From three words or a question, search also works by meaning and highlights the match on the page. The document chat answers questions across several workspaces and names the documents behind the answer.

What happens with a new revision?

Upload it as a new version of the existing document. The previous version stays unchanged, and you can open it, compare it or restore it as a new version.

07 · HOW TO START

Start with your most-used datasheet.

Sign in to your PaperOffice account, upload a datasheet to a workspace and create your first IDP Agent. Billing is usage-based; the pricing page has the details.

Review your holdings

Decide which drives, mailboxes and folders go into which workspace.

Test your first agent

Describe the fields for one datasheet, run the test several times and check the values against the original.

Switch on automation

Assign the agent to the Datasheet document type so every new datasheet is read automatically.

DATASHEETS ON THIS TOPIC

Import & Migration

paperoffice.ai/downloads/paperoffice-ai-datasheet-import-migration.pdf

Classification

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

AI-OCR

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

IDP Agent

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

Smart Search

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

Document Chat

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

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