



SHORT GUIDE • PROBLEM • DOCUMENT CHAOS

NAS, inbox, scan folder: where is it this time?

One set of documents instead of many places to look.

Documents sit on file servers, in mailboxes, in scan folders and in old exports. This short guide shows how PaperOffice connects those places, recognizes every document and organizes it in workspaces. For offices and departments whose filing has grown over the years.

THE KEY POINT IN ONE SENTENCE

Connect storage, pick up new files, import legacy files: AI-DMS recognizes the type of every document, suggests a storage path and a name, and makes the whole set searchable.

01 · THE PROBLEM

Everyone files where it fits. Nobody knows every place.

Contracts on the file server, invoices in the mailbox, scans in the folder at reception, older years as an export from a legacy system. Every place follows its own logic, and each new hire adds another one. Anyone who needs a document first asks where it might be.

WHY IT HAPPENS

Filing is manual work

Someone has to read, name and file every document. Under time pressure it lands wherever is quickest, and the folder logic drifts further apart month by month.

Every channel has its own place

Mail comes by email, scans land in the scan folder, project files on the server. Each route files into its own storage, and nobody brings the places together.

Copies instead of versions

One contract turns into files like final, final_new and final_v2. Nobody records which one is valid, and every copy sits in a different place.

HOW YOU NOTICE IT

- Asking "Where is that?" takes more time than the actual work.
- The same invoice sits in the mailbox, on the server and as a printout in a binder.
- Folders like "Misc" or "To sort" grow faster than all the others.
- New colleagues need a long time to understand the filing.
- Before an audit or a meeting, people search first and work second.

02 · THE WAY WITH PAPEROFFICE

Collect first, then organize.

A one-time cleanup loses its effect as long as filing stays manual work. PaperOffice picks up documents from the places where they sit today, has AI-DMS read them and files them in workspaces with clear access rights.

1

Connect storage

A Storage Mount connects a NAS, server, S3 bucket or mailbox via SFTP, WebDAV, S3, IMAP or Reverse-SSH. PaperOffice stores the credentials encrypted.

[MODULE: STORAGE MOUNTS](#)

2

Pick up new files

A connector checks a folder or a mailbox on a schedule. Import takes over the file, Index leaves the original on your storage and makes it searchable.

[MODULE: CONNECTORS](#)

3

Bring in legacy files

The import wizard reads a ZIP, a mount folder or a mailbox, shows the count and size up front and skips duplicates with a SHA-256 comparison.

[MODULE: IMPORT & MIGRATION](#)

4

Recognize type, suggest path

AI-DMS recognizes document type, language and direction, from Premium on also the sender. It suggests storage paths and a meaningful name, without training.

[MODULE: CLASSIFICATION](#)

5

Separate and find again

Workspaces separate clients, departments or projects with their own group rights. Search runs across all workspaces you have access to.

[MODULE: WORKSPACES](#)

03 · IN THE APP

From storage location to an organized set.

Every step works in the web app. Storage Mounts, import and search are also available via the REST API and as MCP tools, for example for Claude or Cursor.

1

Connect storage

Under **Document AI** › **Storage Mounts**, create a mount with the purpose import source, enter protocol, host and credentials, and test the connection before saving.

2

Have new files picked up

Under **Document AI** › **Connectors**, create a connector: choose the mount and the target workspace, then set Import or Index and the interval.

3

Import legacy files

Under **Document AI** › **Workspaces**, select the target workspace and choose **Actions** › **Import Documents**. Pick a ZIP, a mount folder or a mailbox, check count and size, then start.

4

Add your own types

Under **Document AI** › **Document Types**, use **New document type** to enter a name and a short instruction for the AI in English, plus retention and legal basis.

5

Make the order visible

Under **Options** › **Configure view**, switch on the **Folder view**: its folders come from the storage paths. New revisions go to the same document via **Versions** › **Upload new version**.

TIP FROM PRACTICE

Start with the place that holds the most files Connect one storage location first, with a connector in Index mode. The originals stay where they are, and your team already searches in PaperOffice. Then add the other places, one after the other.

04 · AN EXAMPLE

An architecture firm tidies up its filing.



An architecture firm with 14 employees. Plans as PDF, contracts and correspondence sit on the NAS, in the project mailbox, in the scan folder and in an export from the old project software. The owner wants one set of documents in which every project can be found in full.

BEFORE

- Every project has folders on the NAS, emails in the mailbox and scans in the folder at reception.
- Plan revisions are called final, final_new and final_v2 and sit in several places.
- Anyone looking for something asks the project lead where it might be.
- Old projects are stuck in an export nobody has opened in a long time.

WITH PAPEROFFICE

- A connector in Index mode reads the NAS, and the files stay there.
- A second connector picks up the emails from the project mailbox with all attachments.
- The export goes into the Archive workspace via the import wizard, duplicates drop out.
- New plan revisions land as a version on the same document.

An example for illustration with a fictitious firm. Check for your own business which storage locations to connect and which rights each workspace should have.

05 · CHECKLIST

Ready for an organized set of documents?

Settle these points before the first run. They show where documents sit today and how the set should be separated in the future.

- ☐ Every place with documents is listed: file servers, NAS, buckets, mailboxes, scan folders.
- ☐ Each storage location has its own login for PaperOffice.
- ☐ For each workspace it is clear which group may view, upload or do everything.
- ☐ Retention per document type is agreed with your advisor.
- ☐ After the first run, one person spot-checks type and storage path.
- ☐ For each place you have decided whether the files move (Import) or stay (Index).
- ☐ The workspaces are planned, for example per client, department or project.
- ☐ In-house document types are collected and described in one sentence each.
- ☐ Legacy files are split into batches of up to 2,000 files, for example per year.
- ☐ The team knows where new revisions belong: as a version on the same document.

06 · FREQUENTLY ASKED QUESTIONS

What to settle before the first run.

Do we have to tidy up first?

No. The documents come in as they are. AI-DMS reads type, language and direction from the content, from Premium on also the sender. Sorting happens after reading them in, not before.

What about names like final_v2_new?

The file name no longer decides where a document goes. AI-DMS suggests a meaningful name and storage paths. You upload new revisions to the same document via **Upload new version**, and the previous version is kept.

Do departments and clients stay separate?

Yes. Workspaces separate document sets together with group rights: view and download, plus upload or full access. Search shows matches from the workspaces a person has access to.

Do the files have to move?

You decide per place. A connector in Index mode leaves the originals on your storage and follows every change. In Import mode it takes the files over into the workspace, encrypted.

Is our folder structure kept?

When importing, the original folder path stays on each document as metadata. The **Folder view** then shows the documents by storage path, for navigation and filtering.

How do emails get into the set?

As a saved file (.eml or .msg) by upload, through a connector from an IMAP mailbox, or once via import. Attachments become documents of their own, linked to their email.

07 · HOW TO START

Start with one storage location and one workspace.

Sign in to the app, create a workspace and connect the place that holds most of your documents today. Billing is based on usage; the pricing page has the details.

List your places

Write down every filing location and mark which ones move and which ones stay connected via Index.

Connect one storage location

Create a Storage Mount, put a connector in Index mode on it and look at the first matches in search.

Read the datasheets

The datasheets below describe Storage Mounts, Connectors, Import, Classification, Workspaces and Search in detail.

DATASHEETS ON THIS TOPIC

Storage Mountspaperoffice.ai/downloads/paperoffice-ai-datasheet-storage-mounts.pdf**Connectors**paperoffice.ai/downloads/paperoffice-ai-datasheet-connectors.pdf**Import & Migration**paperoffice.ai/downloads/paperoffice-ai-datasheet-import-migration.pdf**Classification**paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf**Workspaces**paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf**Smart Search**paperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf

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