



SHORT GUIDE • PROBLEM • SLOW PROCESSES

Requests that sit for days? The next step starts on its own.

A process rarely gets slow because the work takes long. It gets slow because it sits between two steps. This short guide shows how Connectors, AI-DMS and Workflow Agents take over the handoffs and where your team approves with a deadline. For purchasing, accounting and business teams.

THE KEY POINT IN ONE SENTENCE

The file comes in on its own, AI-DMS reads it, a Workflow Agent handles the steps, and wherever a person should decide, a task with a deadline waits in the web app and on the smartphone.

01 · THE PROBLEM

The work takes minutes. The waiting takes days.

A purchase request is checked quickly. Getting it approved still takes days: it sits in a mailbox, waits for the scan, for forwarding, for the manager's signature and for filing. Every handoff is one more desk where the process comes to a stop.

WHY IT HAPPENS

Someone has to get it started

A document arrives by mail, email or scanner. Before anything happens, someone has to find it, open it and send it to the right place. If that person is out, the process waits.

Read first, then decide

Who is responsible is written in the document: type, amount, department, deadline. As long as someone pulls that out by hand, every route depends on a person who happens to have time.

Approvals without a deadline

An approval lands in an inbox among many other messages. Nobody sees how long it has been there, and follow-ups run by phone and hallway talk.

HOW YOU NOTICE IT

- Asking "Where is this request?" first starts a search.
- Approvals get chased by email, often more than once.
- Documents sit in the inbox tray until someone has time to forward them.
- The same data is retyped for every step.
- Only the payment reminder shows that an invoice was never approved.

02 · THE WAY WITH PAPEROFFICE

Hand the handoffs to rules, keep the decisions with people.

PaperOffice closes the gaps between the steps: files come in on their own, AI-DMS reads them, and a Workflow Agent starts as soon as a document has been processed. People come in wherever you decide.

1

Intake without lifting a finger

A Connector checks NAS folders, SFTP, S3, WebDAV or a mailbox on its schedule and puts every new file into the target workspace. A webhook URL starts a prompt sync.

[MODULE: CONNECTORS](#)

2

Read instead of retype

AI-DMS detects document type, language and direction, and from Premium also sender and amounts. Through the document type, a Workflow Agent sets which documents start its process.

[MODULE: CLASSIFICATION](#)

3

Fields with their source

An IDP Agent then reads the fields your process needs, such as amount, cost center or order number, each with page and source location. A missing required field creates a review task.

[MODULE: IDP AGENT](#)

4

The agent handles the steps

A Workflow Agent starts when AI-DMS is done. It works from your instruction in plain words: move, set fields, rename, create tasks. Every run is logged.

[MODULE: WORKFLOW AGENTS](#)

5

Approval with a deadline, on mobile too

With execution approval, a person confirms before the agent continues. The task carries a deadline and waits in the web app and in the inbox of the mobile app.

[MODULE: MOBILE APP](#)

03 · IN THE APP

One process in the app, step by step.

Here is how to set up a process that starts at intake and ends with your manager's approval. Workflow AI is included in the Professional plan.

1

Connect the intake

Under **Document AI > Connectors**, create a Connector for your incoming folder or mailbox and choose the target workspace.

2

Create the agent

Under **Workflow AI > Workflow Agents**, use **Create Workflow Agent** to pick a name and model tier, with **After AI-DMS has completed** as the trigger, narrowed to a workspace or document type.

3

Describe the process

In **Prompt Studio**, describe in plain words what should happen, for example "move purchase requests to the Purchasing workspace and submit them for approval".

4

Test and approve

Start dry-run **plays the instruction through on a test document without changing anything**. Then turn on **Execution approval**, set the deadline and switch on automation.

5

Tasks and runs at a glance

Under **Workflow AI > Human In The Loop Tasks**, open approvals are listed with their deadline and overdue ones are flagged; **Forward** hands a task to another person. Every run appears under **Workflow AI > Agent executions**.

TIP FROM PRACTICE

Check the process first, then automate Run the agent with **Execution approval** for the first few days. A person then confirms every execution before the agent continues. Once the results are steady, decide whether the approval stays.

04 · AN EXAMPLE

A purchasing team with overflowing trays.



A maker of packaging machines with 180 employees. Purchase requests come as PDFs from the departments into a purchasing mailbox. Above a value limit, the division manager signs, and she is often on site at customers. The purchasing manager wants to know where every request stands.

BEFORE

- A colleague checks the mailbox each morning and forwards every request by hand.
- Amount and cost center are retyped into the approval list.
- The division manager signs on paper when she is in the office.
- Finding out where a request stands takes a round of phone calls.

WITH PAPEROFFICE

- A Connector brings every new email with its attachment into the Purchasing workspace.
- AI-DMS and an IDP Agent read type, amount and cost center with their source.
- A Workflow Agent submits the request for approval, and the manager approves on her phone.
- Open approvals show their deadline in the task list, and every run is in the log.

A made-up example for illustration. Check for yourself where in your process a person has to decide and who should receive the tasks.

05 · CHECKLIST

Check your process before you automate it.

Walk through a typical request from intake to filing. Every point where you hesitate marks a place where time is lost today.

- | | |
|--|---|
| ☐ Through which channels do the documents arrive: mail, email, scanner, folder? | ☐ Who starts the process today, and what happens when that person is away? |
| ☐ Which values decide the route, such as type, amount, department or deadline? | ☐ Which steps are pure handoffs that could follow a rule? |
| ☐ Where does a person really have to decide? | ☐ What deadline is right for each approval? |
| ☐ Who takes over an approval when the responsible person is on the road? | ☐ Where should the result end up, and who needs to know about it? |
| ☐ Which test document will you use to check the process before going live? | ☐ Who regularly looks at open and overdue tasks? |

06 · FREQUENTLY ASKED QUESTIONS

What purchasing and IT ask before the start.

Do we need to write code?

You describe the process in plain words in **Prompt Studio**, which turns it into the agent's instruction. Developers can also create agents through the REST API or MCP and run them on individual documents.

What happens if nobody approves?

The run waits until a person decides. The task carries a deadline; once it has passed, the task list flags it as overdue. With **Forward**, another person takes over.

Can we see where a request stands?

Under **Workflow AI › Agent executions**, every run is listed with status, document and duration, plus the step history and a tool timeline showing every change. Open approvals with their deadline are under **Workflow AI › Human In The Loop Tasks**.

What starts a Workflow Agent?

Completion of AI-DMS processing, a changed metafield, a completed task, a completed approval or signature. You can also start it by button, REST API or MCP.

Can we test the process first?

Yes. **Start dry-run** plays the instruction through on a test document. Changing actions are simulated, and the document stays unchanged. Automation can be switched on once the prompt is approved and a test has succeeded.

How does the result reach other systems?

Webhook targets report every successful or failed run to n8n or your own URL, signed and with up to 10 retries. Your system verifies the signature and fetches the data through the REST API.

07 · HOW TO START

Start with the request that sits the longest

Pick a frequent request, connect its intake with a Connector and describe the process under **Workflow AI › Workflow Agents** . Workflow AI is included in the Professional plan, and billing is based on usage.

Read the datasheets

The datasheets on Workflow Agents, Connectors and IDP Agent show features, limits and menu paths in detail.

Start with a test document

Upload a typical document and play the instruction through in a dry-run before automation takes over.

Set it up together

For your first process, we are happy to advise you through the contact page, including which plan fits you.

DATASHEETS ON THIS TOPIC

Workflow Agentspaperoffice.ai/downloads/paperoffice-ai-datasheet-workflow-agents.pdf**Connectors**paperoffice.ai/downloads/paperoffice-ai-datasheet-connectors.pdf**Classification**paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf**IDP Agent**paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf**Mobile App**paperoffice.ai/downloads/paperoffice-ai-datasheet-mobile-app.pdf

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