



SHORT GUIDE · PROBLEM · DOCUMENTS YOU CANNOT FIND

File name forgotten, colleague on vacation?

Now you find it in your own words.

When people look for a document, they usually know what is in it and rarely its file name. This short guide shows how Smart Search finds documents through full text, OCR text, entities and meaning, and how the chat answers questions with sources. For anyone who looks for files every day.

THE KEY POINT IN ONE SENTENCE

One search bar for all your documents: full text, OCR text from scans, entities and meaning in one ranking, highlighted in the document and limited to the workspaces you have access to.

01 · THE PROBLEM

The document is there. The way to it is missing.

File system search knows file names and folders. If you forgot the name, or someone else filed the document, you search by hand: open folders, flip through files, ask colleagues. With scans even a full-text search helps little, because a scan starts out as an image.

WHY IT HAPPENS

The name says little

Scan_0042.pdf, Document1.docx, final_new.pdf: file names are made in a hurry. Whoever searches later remembers the sender, an amount or the content, rarely the name.

Scans are images

To file search, a scanned sheet of paper is an image. Without text recognition it finds neither names nor numbers in it.

Different words, same thing

One person searches for "lease warehouse", the document says "use agreement hall 3". A pure keyword search finds just what is written word for word.

HOW YOU NOTICE IT

- You open several folders before you find a document.
- Searching runs through colleagues who know who filed what.
- Scanned receipts never show up in file search.
- The same document is requested again because the old one cannot be found.
- Work stalls during vacation or sick leave because the filing lives in one person's head.

02 · THE WAY WITH PAPEROFFICE

Describe instead of guessing keywords.

A document becomes findable when it is filed. AI-DMS reads every document and puts OCR text, type and embeddings into the index, from Premium on also entities. Search uses all of them at once.

1

One set of documents

Upload, email file, scanner inbox or connector: new documents land in the workspace. A connector in Index mode makes files on your NAS searchable as well.

[MODULE: CONNECTORS](#)

2

Read while filing

AI-OCR reads scans and photos as part of AI-DMS processing. The OCR text is part of the index, and scanned PDFs are found just like digital documents.

[MODULE: AI-OCR](#)

3

Type, companies, numbers

Classification recognizes the document type. From Premium on, entities are added: companies, people, amounts, invoice and contract numbers, IBANs.

[MODULE: CLASSIFICATION](#)

4

Search in your own words

One search bar, one ranking from full text, OCR, entities and meaning. For a question or from three words on, the app also searches by meaning.

[MODULE: SMART SEARCH](#)

5

Ask instead of search

The chat answers questions across one, several or all workspaces. The documents it found are listed under the answer, and one click opens the original.

[MODULE: DOCUMENT CHAT](#)

03 · IN THE APP

From search term to the right passage.

Search needs no setup; it works with the AI-DMS index. The same search is available via the REST API and as an MCP tool, for example for Claude or Cursor.

1

Enter a search term

Type a word, a number or a sentence in the search bar, or speak it with **Voice input**. Set the scope with **Current Workspace** or **All Workspaces**.

2

Narrow down

Under **Filters**, narrow down by document type, keywords, status, region, date range or signature. **Save current filter** keeps the selection.

3

See the passage

Open a result: the search term is highlighted on the page. **Next match** jumps to the next spot, and the match list names the pages.

4

Ask the chat

Click **Ask Agent** at the top of the app or press Alt+A, choose the workspaces in **Agent context** and ask your question in your own words.

5

Check the answer

The **Sources** bar shows the documents behind the answer. One click opens the original, so you can check every statement against its source.

TIP FROM PRACTICE

Full sentences find more Describe the document with three or more words or as a question, for example “contract with the cleaning company for hall 3”. Then the app also searches by meaning. For an invoice number, the number is enough.

04 · AN EXAMPLE

An engineering firm finds its expert reports again.



An engineering firm with 25 employees. Expert reports, inspection reports and correspondence from many years sit in binders in the archive corridor and as scans on the server. People usually search for a building project, a client or an inspection number.

BEFORE

- Anyone who needs an old report first asks the colleague who filed it back then.
- The scans on the server are named by date and device, rarely by content.
- File search finds neither the client nor the inspection number in the scans.
- In the archive corridor, people open one binder after another.

WITH PAPEROFFICE

- The scan folder goes into a workspace via the import wizard and is read there.
- Search finds the client and the inspection number in the OCR text of the scans.
- Anyone who forgot the name describes the building project in one sentence.
- The chat names the matching reports for a question, and one click opens the original.

An example for illustration with a fictitious firm. Test with your own documents which AI-DMS tier your scans need and how to cut your workspaces.

05 · CHECKLIST

Ready for a search that knows the content?

Use these points to check whether your documents will become findable and whether access rights fit the search.

- ☐ The most important filing locations are connected or imported as legacy files.
- ☐ For scans and photos, an AI-DMS tier is chosen that suits your documents.
- ☐ Anyone searching for companies, amounts or IBANs works in workspaces with Premium or Ultra.
- ☐ The team knows: type a number directly, describe a topic in a full sentence.
- ☐ The team knows that the chat answers questions across several workspaces and shows sources.
- ☐ Every workspace you search in processes new documents with AI-DMS.
- ☐ Existing documents have been processed with AI-DMS once.
- ☐ Group rights per workspace are reviewed, because search shows everything a person may see.
- ☐ Frequent narrowing choices are kept with `Save current filter`.
- ☐ Every answer from the chat is checked against the linked original before it is passed on.

06 · FREQUENTLY ASKED QUESTIONS

What users ask before switching.

Do we have to know the right keywords?

No. Describe the document the way you would describe it to a colleague. For a question or from three words on, the app also searches by meaning, and it finds numbers directly.

Are files on our file server found?

Yes, as soon as a connector in Index mode reads the folder. The originals stay on your storage, and PaperOffice reads every document for search and chat.

What helps with too many results?

The list is one shared ranking across all sources. Narrow down under **Filters** by type, date range or status, choose **Current Workspace** instead of **All Workspaces**, or ask the chat for a summary.

Are scans and photos found?

Yes. The OCR text from AI-DMS processing is part of the index. Scanned PDFs and photos are found like digital documents, and the passage is highlighted in the opened document.

Does everyone then see everything?

Everyone sees matches from the workspaces they have access to, in the app, via the API and over MCP. Protected workspaces stay out of the results until they are unlocked.

Are older documents in the workspace found?

Yes, once they are processed with AI-DMS. Select the documents, choose **Actions › Agents & workflows › AI-DMS** and set the tier. After that they are in the index with their OCR text.

07 · HOW TO START

Find your next document in your own words.

Sign in to the app, open a workspace and describe in the search bar what you are looking for. Billing is based on usage; the pricing page has the details.

Search with a test sentence

Take a document that took a long time to find recently and describe it in one sentence.

Make legacy files readable

Process a folder of old scans with AI-DMS and check whether names and numbers are found.

Read the datasheets

The datasheets below describe Search, AI-OCR, Classification, Entities, Document Chat and Connectors in detail.

DATASHEETS ON THIS TOPIC

Smart Searchpaperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf**AI-OCR**paperoffice.ai/downloads/paperoffice-ai-datasheet-ocr.pdf**Classification**paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf**Entities**paperoffice.ai/downloads/paperoffice-ai-datasheet-entities.pdf**Document Chat**paperoffice.ai/downloads/paperoffice-ai-datasheet-document-chat.pdf**Connectors**paperoffice.ai/downloads/paperoffice-ai-datasheet-connectors.pdf

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