



SHORT GUIDE • PROBLEM • KNOWLEDGE LOSS

A colleague leaves. Who knows the history now?

Ask your documents. The answer shows its sources.

When experienced people leave, the context often leaves with them: which amendment applies, what was agreed with the customer, why it was solved that way. This short guide shows how PaperOffice links documents, makes them answerable and captures what people know.

THE KEY POINT IN ONE SENTENCE

Read, link, ask: AI-DMS recognizes companies, people and numbers, the Knowledge Graph connects documents that belong together, and the chat answers questions with the documents behind them.

01 · THE PROBLEM

Knowledge lives in heads. And in scattered notes.

Whoever has looked after a customer for years knows the history: agreements, amendments, special arrangements. Much of it is in documents, but spread across folders, mailboxes and notebooks. When that person leaves, the successor starts by searching and asking around.

WHY IT HAPPENS

**Connections are written
nowhere**

Contract, amendment and acceptance report sit in different folders. The person who filed them is the one who knows they belong together.

Notes are private

Machine settings, phone agreements and tricks of the trade sit in notebooks, on slips of paper or in a personal mailbox. Everyone else cannot see them.

Handovers are short

Onboarding often gets only a few days. Whatever goes unmentioned in that time, the successor has to find out alone later.

HOW YOU NOTICE IT

- For certain customers there is exactly one person who knows the details.
- After someone leaves, the same questions come up again and again.
- New colleagues spend a long time looking for the history of a case.
- Decisions are made again because the old reasoning cannot be found.
- Handwritten notes sit in drawers and get photographed when needed.

02 · THE WAY WITH PAPEROFFICE

Filing turns into context.

Knowledge stays when it is written down, can be found and is connected to the right documents. PaperOffice reads the documents, links them into cases and answers questions about them. What people know by heart goes into the knowledge base.

1

Collect and make readable

Contracts, reports, email files and scans reach the workspace by upload, connector or import. AI-OCR reads scans as well, and in the Ultra tier also handwriting.

[MODULE: AI-OCR](#)

2

Companies, people, numbers

From AI-DMS Premium on, PaperOffice reads companies, people, dates, amounts, invoice and contract numbers from every document and merges spellings of the same company.

[MODULE: ENTITIES](#)

3

Recognize cases

The Knowledge Graph connects documents with the same reference number, from the same business partner and with similar content. You add your own links by drag and drop.

[MODULE: KNOWLEDGE GRAPH](#)

4

Ask instead of search

The chat answers questions across one, several or all workspaces and reads the matching documents itself. The documents it found are listed under the answer.

[MODULE: DOCUMENT CHAT](#)

5

Capture what people know

In the knowledge base your team writes articles, FAQs and snippets, in several languages too. Your own chat agents also answer from the knowledge bases assigned to them.

[MODULE: KNOWLEDGE BASE](#)

03 · IN THE APP

From a stack of notes to answerable documents.

Every step works in the web app. Knowledge Graph, entities and timeline are also available via the REST API and as MCP tools, for example for Claude or Cursor.

1

Process with Premium

Select documents, choose **Actions › Agents & workflows › AI-DMS** and set the Premium or Ultra tier. Entities and relationships are created during this processing.

2

See the cases

In the document list, choose the **Transactions** view under **Options › Configure view**. Same reference, same partner and similarity appear as colored lines.

3

Link them yourself

Drag one document onto another and choose **Link documents**, with a relation type and a note. The documents stay where they are.

4

History in order

The **Timeline** view orders documents by date. Inside a document, the **Activities** tab holds notes and tasks with a deadline and an assignee.

5

Ask and capture

Ask with **Ask Agent**; the **Sources** bar shows the documents behind the answer. Under **Knowledge Base AI › Articles**, **Create** starts a new article for the knowledge base.

TIP FROM PRACTICE

Plan the handover as questions Before someone leaves, collect the questions the successor will ask. Whatever the chat answers from the documents is secured. The rest, the experienced person writes down as articles in the knowledge base.

04 · AN EXAMPLE

A workshop secures its master's knowledge.



A family-owned machine workshop with 18 employees. The master machinist retires in a year. Machine settings, customer agreements and repair notes sit in his notebooks, in order binders and in his mailbox. A young colleague is to take over.

BEFORE

- Questions about regular customers go to the master, often by phone in the workshop.
- His notebooks are sorted by his own system.
- Orders, drawings and follow-up questions sit in separate binders.
- Onboarding happens by watching and asking.

WITH PAPEROFFICE

- The notebooks are scanned and read with AI-DMS Ultra, handwriting included.
- The Knowledge Graph connects documents with the same order number into one case.
- What is written nowhere, the master writes up as articles together with his colleague.
- The colleague asks the chat and opens the documents behind the answer.

An example for illustration with a fictitious business. Test with your own notes how well they are read, and decide which knowledge belongs in the knowledge base.

05 · CHECKLIST

Ready for the next departure?

These points help before someone leaves, and just as much in everyday work. They show where knowledge sits today and how it becomes answerable.

- ☐ For every key person you know which customers, machines or cases they handle alone.
- ☐ Workspaces with case documents process with AI-DMS Premium or Ultra.
- ☐ The person's filing locations and mailboxes are in the workspace via connector or import.
- ☐ The successor's questions are collected and asked in the chat once.
- ☐ Internal knowledge bases are kept apart from public ones and assigned only to internal agents.
- ☐ The notebooks, notes and binders of these people are collected and scanned.
- ☐ Handwritten documents run with AI-DMS Ultra so that the handwriting is read.
- ☐ Documents that belong together without a shared number are linked by hand.
- ☐ What is written nowhere is captured as an article in an internal knowledge base.
- ☐ Group rights make sure the successor sees the same workspaces.

06 · FREQUENTLY ASKED QUESTIONS

What to settle before the next departure.

Do we have to tag documents by hand?

No. From AI-DMS Premium on, entities and relationships are created during processing. You add your own links where you want to record a business connection.

Does this work with old scans and handwriting?

Yes. AI-OCR reads scanned pages during AI-DMS processing, and the OCR text is searchable afterwards. In the Ultra tier, AI-OCR also recognizes handwriting.

Does everyone then see everything?

No. Chat and Knowledge Graph show the workspaces the login has access to. Protected workspaces stay locked in the chat until they are unlocked.

What about knowledge that is in no document?

Your team writes it into the knowledge base: articles for instructions, FAQs for short answers, snippets for text blocks. You assign the knowledge base to your own chat agent.

How reliable are the answers?

The documents found are listed under every answer, and one click opens the original. That way you check every statement against its source before you work with it.

What happens to the documents when someone leaves?

They stay in the workspace. When the team account is removed, PaperOffice deletes that account's access, sessions and group memberships. The documents in the workspace remain untouched.

07 · HOW TO START

Start with the case that a single person knows today.

Sign in to the app, put the documents of one case into a workspace with AI-DMS Premium and ask the chat your first question. Billing is based on usage; the pricing page has the details.

Name the key knowledge

Write down which customers, machines or cases depend on a single person today.

Test one case

Upload the contract, amendments and correspondence of one case, then open the **Transactions** view.

Read the datasheets

The datasheets below describe AI-OCR, Entities, Knowledge Graph, Document Chat, Knowledge Base and Timeline in detail.

DATASHEETS ON THIS TOPIC

AI-OCRpaperoffice.ai/downloads/paperoffice-ai-datasheet-ocr.pdf**Entities**paperoffice.ai/downloads/paperoffice-ai-datasheet-entities.pdf**Knowledge Graph**paperoffice.ai/downloads/paperoffice-ai-datasheet-knowledge-graph.pdf**Document Chat**paperoffice.ai/downloads/paperoffice-ai-datasheet-document-chat.pdf**Knowledge Base**paperoffice.ai/downloads/paperoffice-ai-datasheet-knowledge-base.pdf**Timeline**paperoffice.ai/downloads/paperoffice-ai-datasheet-timeline.pdf

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