



SHORT GUIDE · PROCESS · QUALITY CONTROL

Typing test values from certificates by hand?

Measured values arrive as a table with their source.

Test reports, mill certificates, measurement records and calibration certificates arrive as PDF, scan or photo. This short guide shows how PaperOffice recognizes them, reads characteristics with target and actual values as a table, routes gaps to review and checks certificates. For QA and labs.

OVERVIEW

Your own types such as inspection certificate 3.1, characteristics as a table with their source, a review task when a batch or result is missing, and a Trust Agent that checks PDF certificates for hidden text.

01 · THE PROBLEM

The values are in the certificate. The check is in a spreadsheet.

Test reports and mill certificates come from suppliers, labs and your own metrology, each in its own layout. Anyone checking characteristics against the drawing types measured values into a spreadsheet by hand. A missing batch or result often only shows up in an audit or a complaint.

WHY IT HAPPENS

Many sources, many layouts

Suppliers send certificates as PDF, the lab prints records, and handwritten measurement sheets are created at the machine. Every source arranges characteristics, targets and tolerances differently.

Typing takes time and care

Measured values are copied into spreadsheets line by line. A transposed digit or a wrong unit only shows up when someone checks the value against the original.

A certificate is a PDF

PDF certificates can be edited. Whether a value was covered or text was hidden is hard to see on screen.

HOW YOU NOTICE IT

- Measured values from certificates are copied into a spreadsheet by hand.
- A missing certificate for a batch only shows up during the audit.
- Handwritten measurement sheets from the machine sit unscanned in a binder.
- For a customer complaint, the test report and certificate for a batch are searched for.
- Nobody checks the authenticity of a PDF certificate systematically.

02 · THE WAY WITH PAPEROFFICE

Describe once, read every inspection document.

Inspection documents flow into a quality workspace. AI-DMS detects the type, an IDP Agent reads characteristics and values with their source, and whatever is missing becomes a review task. Your inspector judges target and actual against the original.

1

Collect inspection documents

An email connector picks up certificates from the mailbox, the network scanner delivers lab records, and measurement sheets come via the mobile app. All of it lands in the quality workspace.

[MODULE: CONNECTORS](#)

2

Recognize the type

AI-DMS detects test report, measurement record, inspection report, certificate, declaration of conformity and complaint. You add types such as inspection certificate 3.1 yourself.

[MODULE: CLASSIFICATION](#)

3

Characteristics as a table

An IDP Agent reads target, tolerance, actual value and unit per characteristic as the report states them, plus batch, inspector and date. Fields and table rows come with their source.

[MODULE: IDP AGENT](#)

4

Gaps go to review

If a required field such as batch or result is missing, a review task is created in the selected queue. You record corrective actions as a task with a due date on the report.

[MODULE: TIMELINE](#)

5

Check certificates

The Trust Agent checks PDF certificates for hidden or covered text and embedded files, and from Premium on compares the text layer with the page image. The result stays on the document.

[MODULE: TRUST AGENT](#)

03 · IN THE APP

From the mailbox to the characteristic read.

Here is how to set up the quality workspace. You need a mailbox for supplier certificates, a workspace with AI-DMS and a typical test report as an example.

1

Connect the mailbox

Add the mailbox for supplier certificates as a storage mount, then under **Document AI › Connectors** a connector with the quality workspace as its target. Attachments arrive one by one.

2

Add your own types

Under **Document AI › Document Types**, use **New document type** to add types such as inspection certificate 3.1 or calibration certificate and describe in English how to recognize them.

3

Build the characteristics agent

Select a test report, open **Actions › Agents & workflows › IDP** and start with **Free template (Vision Pro)**. Add a table with characteristic, target, tolerance, actual value and unit, then test it.

4

Automatically per type

Under **Document AI › Document Types**, use **Bind IDP Agent** on the Test Report type to set the agent. The **IDP Review** view lists reports with open required fields.

5

Action and authenticity

On the report, create a task with a due date and an assignee on the **Activities** tab. Select PDF certificates and have them checked through **Actions › Agents & workflows › Trust**.

TIP FROM PRACTICE

Test with your worst measurement sheet For the first test, take a handwritten measurement sheet, a skewed scan and a supplier certificate. Repeat the test run several times: if the values stay the same, the agent reads these layouts consistently.

04 · AN EXAMPLE

An automotive supplier, many certificates a week.



A supplier of vehicle parts with 200 employees makes turned and milled parts from purchased steel. Quality assurance checks mill certificates from the steel mills, measurement records from the metrology room and test reports from external labs. One customer requires evidence per batch for every delivery.

BEFORE

- Mill certificates arrive by email, measurement records as printouts from the metrology room.
- Measured values are typed into a spreadsheet by hand and compared with the drawing.
- If a certificate lacks the batch, it only shows up at the next audit.
- For a complaint, the test report and certificate for a batch are pulled together.

WITH PAPEROFFICE

- Certificates and records land in the quality workspace through connector and scanner.
- Characteristic, target, tolerance and actual value are a table with their source.
- If the batch is missing, the report waits as a review task for the inspector.
- A search for the batch number finds certificate, test report and measurement record.

An invented business for illustration; all people are made up. Check with real reports, handwritten ones included, whether characteristics and values are read correctly before they are passed on.

05 · CHECKLIST

Before the first certificate is read.

Go through the points with quality assurance, the lab and purchasing. Each of them can be settled in your own business before you start.

- ☐ For each kind of inspection document, it is clear which characteristics and values you need.
- ☐ The characteristics table is agreed: characteristic, target, tolerance, actual value, unit.
- ☐ Allowed values are set for the result, such as "OK" and "not OK".
- ☐ It is settled who goes through the IDP Review view every day.
- ☐ Corrective actions for a deviation are created as a task with a due date on the report.
- ☐ Your own types such as inspection certificate 3.1 or calibration certificate are set up and tested.
- ☐ Batch, inspection date and result are required fields with review.
- ☐ The agent has been tested on reports from several suppliers, handwritten scans included.
- ☐ It is clear who judges and releases target and actual values against the original.
- ☐ PDF certificates from new suppliers go through the Trust Agent before release.

06 · FREQUENTLY ASKED QUESTIONS

What inspectors and quality managers ask.

Which inspection documents does PaperOffice recognize?

Test report, measurement record, inspection report, certificate, declaration of conformity and complaint are system types. You add inspection certificate 3.1, certificate of analysis or calibration certificate as your own type with a short description.

Are handwritten measurement sheets read?

Yes. With AI-DMS Ultra, AI-OCR also reads handwriting. The **Free template (Vision Pro)** template is a custom schema for layouts with handwriting, tables, checkboxes and stamps. Test with real measurement sheets before the agent runs automatically.

How do we check whether a certificate was altered?

The Trust Agent reports hidden or covered text, embedded files and scripts, and from Premium on differences between text layer and page image. It returns a risk score from 0 to 100, and a person makes the decision.

Where do the target values come from?

If the report states target and tolerance, the IDP Agent reads them in the same row as the actual value. Your inspector judges against the original. The values go on as CSV, Excel or JSON.

What happens if a value is missing?

You set this per field: required with review, soft review notice, 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 we keep calibration certificates in view?

If the certificate states an expiry date, AI-DMS reads it as **Valid until** from Premium on. The timeline orders the certificates by this date, and on each one you create a task with a due date and an assignee, for example for the next calibration.

07 · HOW TO START

Read your next test report with its source.

Sign in to your PaperOffice account, upload a test report into the quality workspace and create the first characteristics agent. Costs follow usage, and the pricing page spells them out.

Pick one inspection document

Start with the kind that arrives most often, for example the mill certificate of your most important steel supplier.

Run alongside for two weeks

Let the agent run next to your current checks and compare the values against the original.

Extend to all documents

Once the route works, create agents for measurement records and test reports and bind them to the document types.

DATASHEETS ON THIS TOPIC

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

Trust Agent

paperoffice.ai/downloads/paperoffice-ai-datasheet-document-integrity-check.pdf

Timeline

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

Smart Search

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

MORE ON THIS TOPIC

Quality control

paperoffice.ai/en/solutions/process/ai-quality-control-automation-iso



MORE ON THIS TOPIC

paperoffice.ai/en/solutions/process/ai-quality-control-automation-iso

PRICING

paperoffice.ai/en/pricing

CONTACT

paperoffice.ai/en/contact