Mariner Software

Using Reports View to create reports in Paperless 3

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One of the view types in Paperless is Report view. With report view it is possible to create one of four different types of reports:

Expense Report
An Expense Report is a report designed to display information on Receipts in a collection. Expense reports display a **summary table** of library items in the currently-selected container and an array of **thumbnail summaries**, for each library item.

Table Report
Table reports display the same summary table that appear in Expense Reports.

Pie Chart Report
Pie chart reports display a breakdown of all Receipt-type library items in the currently-selected container. The breakdown is returned as a pie-chart, where data from specific field (such as Amount or Tax/ VAT) for each library item is represented within a pie chart as a percentage of the total amount fora field in the currently-selected container.

Contact Report

A Contact Report displays a list of summary thumbnails for each Contact-type library item in the current container.

Reports are generated for the container currently selected in the source list. If a report is created, for example, while you are viewing the Inbox, a report will display for all library items in Inbox.

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How to generate a report in Paperless

Reports are generated for the container which contents are currently displayed in the Paperless library window. If the library window currently displays the contents of LIBRARY, generating a report will generate a report for the library items displayed under LIBRARY. Similarly, a report is generated while viewing Inbox will display information for all library items in the Inbox.

1. Select the container (for example, LIBRARY, Inbox, or the collection, smart collection, or folder) you would like to display a report for.

2. Switch to Reports view. This can be done either by selecting **as Report** from the **View** menu or by clicking on Report in the segmented view controller.

After following these steps, a report should generate, the report should display the contents of the container the report was generated for.

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How to print a report in Paperless

In Paperless it is possible to print expense reports. Expense reports print in two parts: the first page displays a summary table, all transactions (and their metadata) within the container the report has been generated for, and each page following the summary display an image of a specific receipt (and its metadata) in the report.

To print an expense report in Paperless, follow these steps:

1. First, generate the report. Once the report has generated, the Reports toolbar will display at the top of Reports view.

2. Configure the report to display the fields to display in the printout. This can be done by clicking the View Options button in the Report toolbar.

3. In the reports toolbar, "Print". Click the button to raise print settings.

4. In print settings, select the display format to print receipts in. There are three display formats available in Paperless:

- **1-up**: displays receipt summaries as one-per-page.

- **2-up**: displays receipt summaries as two-per-page.

- **4-up**: displays receipt summaries as four-per-page.

5. Receipts displayed in 2-up and 4-up formats display as tiled on the page.

6. Once you have configured printing options, instruct Paperless to print: either select **Print…**from the **File** menu or press **command-P**.

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Frequently-asked questions

Reports seem to take a long time to load. What can be done to resolve this?

In our testing, containers with more than 100 reports might take longer than a minute to load.

To reduce the amount of time it takes to load a report, please consider reducing the number of library items in the container the report will be generated for.

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After upgrading a report, the reports appear to render with errors. What can be done to resolve this?

If you notice rendering errors after updating, the issue is likely related to the directory used to render reports. It should be possible to resolve this issue by following these steps:

1. In Paperless, change the view type in Paperless, so that it is no longer displaying reports.

2. In Finder, select **Go to Folder** (under OS X 10.6: **to Folder**) from the **Go** menu. A text field should appear.

3. Paste the following path (including the tilde character at the beginning) into the text field; then, press the enter (or return) key on your keyboard: ~/Library/Application Support/Paperless/. A new window will appear in Finder, with title Paperless; stored within this folder should be a folder named Reports.

4. Remove the folder Reports.

Once you have done this, display reports view again in Paperless.

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I use a currency format that does not use a dollar sign ($) as a

currency designator. Can I make that use my local currency designator (and not the dollar sign)?

No. At this time, it is unfortunately not possible in Paperless reports to use any currency designator other than the dollar sign ($).

When I create a pie chart report, nothing shows up. What can be done to resolve this?

Pie chart reports only populate information from library items marked as Receipt. If a container does not contain any Receipt-type library items, no information will display in a report generated for the container.

It should be possible to resolve this issue either by adding Receipt-type library items to the container or by changing the document type of some of the library items in the container to Receipt.

When I create a contacts report, nothing shows up. What can be done to resolve this?

Contacts reports only populate information from library items marked Contact. If a container does not contain any Contact-type library items, no information will display in a report generated for the container.

It should be possible to resolve this issue either by adding Contact-type library items to the container or by changing the document type of some of the library items in the container to Contact.

When I print reports, a information isn't formatted the way I expect it should be. What can be done to resolve this?

- The table at the beginning is cut off in the middle.

- The reports toolbar displays in the printout.