

Mariner Software

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How to export details information from Paperless 3 to CSV/ Spreadsheet

Customer Service - 2018-12-17 - Exporting from Paperless

In Paperless 3 for Mac, it is possible to export all details information from the currently-selected container to a **comma-separated value (CSV)** file. CSV is a text-based format that can be used to store tabular data. CSV is widely compatible: the overwhelming majority of spreadsheet applications include support for CSV.

Details information includes any information saved to any field for a library item that displays within the Details pane while the library item is selected. When Paperless exports details information to CSV, it exports all data for all fields within a library, regardless of whether the fields display within the Details pane.

To export Details information to CSV, please follow these steps:

1. **Select the container to export details information from.** To export details information for all library items in a library, select **LIBRARY** (rendered in all caps). To export details for all receipts, select the **Receipt** smart collections under the heading **RECENT** (rendered in all caps).

[We document in additional detail how to use the Source list to locate library items in this knowledge base article.](#)

2. **From the File menu, select Export to CSV...**
3. **Use the Save File dialog that appears to save the CSV file.**

Following these steps should export details information to a CSV file (saved at the location and name specified in step 3) for all library items that display within the container selected in step 1.

Frequently-asked questions

How can I open CSV?

It should be possible to open a CSV file with a spreadsheet application, such as Microsoft Excel, Apple Numbers, or Mariner Calc.

For support to import data to a spreadsheet from CSV, please review documentation

provided by the developer of the spreadsheet application.

Why is CSV useful?

There are two reasons we can suggest that it might be useful to export data to CSV:

- CSV is widely supported. The overwhelming majority of spreadsheet applications can open a CSV file.

Certain [financial management programs](#) also allow users to import details information from CSV.

- CSV is text-based (not binary). It is easy to open (and view) with any text editor (such as TextEdit).
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How is Splits data exported to CSV?

Splits items are exported to the same line as the parent item. Fields for each Splits item are exported to a column that appears to the right of the last regular (non-Splits) field in the CSV.

Is there any way to control which fields are exported to CSV?

Not directly: there is no configuration in Paperless specific to CSV export. If a field is available to a library, it will be exported to CSV, regardless of whether the field currently displays in the Details pane or whether data is stored within the field for any library library item within the container currently being exported to CSV.

If a field is not available within a library, Paperless will not export the field to CSV. If there are fields, then, that are not currently used to store data for any library items within a Paperless library, then, it should be possible to ensure the field is not exported to CSV by removing the field from the library.

Please note: *Removing a field from a Paperless library will also remove any data stored to that field for any library item.*

Tags
calc
csv
data
details
excel
export

mac
metadata
numbers
paperless
spreadsheet