

Paperparrot Manual

What is this app?

Paperparrot originated as a client for the awesome Paperless-ng(x), a document management system that you can host on your own infrastructure like a NAS, homeserver or a server you rent in the cloud.

During early development, I have realized that setting up and maintaining a server is prohibitively complicated and requires quite a big time investment. Thus, I have put more and more time and effort into making the app work offline, completely without a server.

At this point, almost the full functionality of Paperless-ng(x) is available locally, without the need for a server. Setup is as simple as downloading the app and adding documents.

Still, all documents and custom attributes are available on all of your devices via iCloud.

Of course, the integration with a Paperless-ng(x) server is still a major part of the app. Users can simply enter the credentials to their servers and be ready to go, it even offers functionality some of the other client apps don't have, like spotlight integration, keeping documents available offline or support for saved views.

For a deeper dive into available features, read [#Features](#) below.

Why the name?

Even though I do plan on making the source code publicly available at a later point, Paperparrot is not and will be neither free software (link to explanation here) nor open source (another link, why is source code available $\neq$ open source).

Despite being fully compatible to Paperless-ng(x), I want to clearly separate Paperparrot from Paperless in both name and branding as both provide similar but distinct features, in parts target a different audience and follow different development philosophies.

But why Paperparrot?

I was looking for an easy to remember, easy to spell name that is not being used by similar software (which is not as easy as one may think). Thanks to the help of creative people around me, I have landed on this name and branding that fits well and checks all my boxes. I also get a free mascot as a bonus.

What does it do?

Let me start off by telling you what it **doesn't** do:

Paperparrot is not a backup solution. While I put great care into keeping Paperparrot reliable and safe, it does not replace keeping a separate backup of your important files. For more info, please read [#how-to-backup](#) or (maybe link to a simple backup-guide?).

Now that we got that out of the way, what **does** Paperparrot do?

Paperparrot makes the handling and organization of both physical (paper) and digital documents easier. It does this by offering a selection of custom attributes, like tags, document types or correspondents, you can apply to your documents and documents can be searched and sorted by any of these attributes. When adding a document to Paperparrot, it's content is scanned and analyzed (locally, on your device) and attributes are assigned automatically based on your preferences. Once you have everything set up, the workflow for adding a document can be as simple as pressing the button and scanning the document.

AS AN EXAMPLE, LET'S SAY I WANT TO STORE AND ORGANIZE MY PAYSLIPS:

I'll start by creating the document type "Payroll", that matches any of the following words: "payroll, salary, payslip".

Then, I create correspondent for my tax office, that matches the words "tax, payroll, salary, payslip".

I also add a tag for each of my employers that matches their name and the tags "paid" and "pending", with pending matching "payroll".

Now I am ready to add documents and let Paperparrot work its magic. For each payslip I add, Paperparrot automatically adds the correspondent "Tax Office", the document type "Payroll", the tag "pending" and a tag corresponding to the employer that issues the payslip. It will also try to determine the creation date.

For all payslips that I have received payments, I can replace the tag "pending" with "paid".

Now I already have a nice overview of my statements with all important information being visible at a glance.

Now let's assume I have to do my taxes for 2021 and need all the relevant documents:

Instead of painstakingly searching through binders or folders, I can just open the search view in Paperparrot, set the correspondent to "Tax Office" and the date range to 01/01/2021-31/12/2021 and just like that, I have all the documents I need.

With a tap on the "plus symbol", I can save this view to easily access it from the home screen later.

If I wanted to check whether I'm still missing some of the payments, I can just search for "pending" or select the tag from the quick menu.

What if I have an issue with Paperparrot?

Please create a bug report at <https://github.com/LeoKlaus/Paperparrot>. Follow the guidelines for creating an issue and provide as much information as possible without revealing any personal data.

It would be nice if Paperparrot could...

I collect feature requests and ideas for improvement in the discussion section of the repository. You can create feature requests and vote on other ideas here.

What exactly is a...

Generally, there are no rules for what attributes to apply how. If you need some inspiration, this is how the attributes were designed to be used:

- **Correspondent:** The person or institution that is either recipient or issuer of a document.
- **Document Type:** The document type describes what kind of document it's applied to. This could be something like "Paycheck", "Certificate"...
- **Tag:** A tag can contain all kinds of information, a single tag can be assigned to many documents and a single document can have many tags. You can use tags to store all the important information that doesn't fit the correspondent or document type attributes.
- **Created At:** The date a document was originally issued at.
- **ASN:** The archive serial number (short: ASN) is a unique identifier for the document. This can help you to make sorting and archival of physical documents easier.