

Mariner Software

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What are the differences between collections, smart collections, and folders in Paperless?

Customer Service - 2024-05-09 - Managing Library Items and Metadata

What are the three different types of user-defined containers, and how can I use them to organize library items?

- **Collection:** displays library items assigned to it by the user.
- **Smart collection:** displays library items that match each criteria the smart collection is configured to search for.
- **Folder:** used to organize user-defined container (collections, smart collections, and other folders).

This knowledge base article provides descriptions of each of these containers and how to use them.

Collection

A **collection** is a container that is used to organize library items.

Library items are assigned to a collection by dragging the library item from a point in Paperless (such as Library or the Inbox) to the icon for the collection in the Source pane.

Smart Collection

A **smart collection** is a container that is used to organize library items. Smart collections work a lot like a saved search: parameters for the search are saved within the smart collection and the search is run every time you select the smart collection (to display its contents).

Smart collections display library items that match specific search criteria defined when creating or editing the smart collection. When you create a smart collection, a window appears with a list of options to define the types of metadata a smart collection will search for. If you double-click the smart collection (in the source pane), a similar window will appear that you can use to edit the criteria the smart collection uses to search for library items.

The areas a smart collection searches within are defined by which folder (if any) a smart collection is assigned to. If a smart collection isn't assigned to any folder, the smart collection will search your whole library; if the smart collection is assigned to a folder, the smart collection will search within the folder that contains it (more-specifically: within any collections contained by the folder) and any subfolders of that folder.

Folder

A **folder** is a container that is used to organize other user-defined containers. It is possible to assign any of the following things to a folder:

- a collection
- a smart collection
- another folder

Containers are assigned to folders much the same way that library items are assigned to collections. To assign a container to a folder, select the container and drag it to the folder you would like to assign it to.

Folders are not used to organize library items. It is not possible to assign library items to folders. Also, it is not possible to assign default containers (the containers that appear under the **RECENT** and **TYPES** headings in the source list) to a folder.

Frequently Asked Questions

Why don't library items appear in the folders I assign them to?

Library items do not appear in folders because **folders cannot contain library items**. Instead, only **collections** and **smart collections** can contain library items. If you assign the library items to a collection or create a smart collection that will search for the library items, the library items should appear in the collection or smart collection.

Do collections and smart collections store copies of my library items?

Collections and smart collections display **references** to library items. They do not contain duplicate copies of library items.

If I remove a library item from my library, will it also disappear from the collection(s) or smart collection(s) I had assigned it to?

Yes. If you delete a library item from your library, the library item will also disappear from any collections or smart collections you had assigned it to before deleting it.

Related Content

- [Why do library items disappear from Paperless 2 when I change their metadata?](#)
- [Introduction to the library window source list](#)