

Mariner Software

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Introduction to the library window source list

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How can I use the source list to navigate organizational containers in a Paperless library?

The source list displays a list of containers that can be used to locate library items.

Containers are structures provided within the Paperless library, to make it possible to organize, index, and locate library items later. If a Paperless library is like a local public library, containers within a Paperless library are similar to the shelves, book cases, and drawers where library resources can be found in a public library. Some of the structures within a library are made available automatically; containers under COLLECTIONS are created, configured, and organized manually.

LIBRARY

The heading LIBRARY is selectable. LIBRARY is a container that displays all library items within a Paperless library. If a library item exists within a Paperless library, it should display under LIBRARY.

Inbox

Inbox is a container that displays all library items imported to a library recently. The Inbox is typically used as a staging area, to determine which library items details should be entered for.

We explain Inbox in additional detail in [this knowledge base article](#).

RECENT

RECENT is an area where Paperless maintains smart collections for library items that target the Date field. The smart collections under RECENT display library items (from a list of all library items in a library) where the Date field matches criteria defined for the smart collection.

Five smart collections should display under RECENT:

- **Today** - displays library items where the date displayed in the library item's Date field is the same as today's date.
- **This week** - displays library items where the date displayed in the library item's Date field is a date within the current week.
- **This month** - displays library items where the date displayed in the library item's Date field is a date within the current month.
- **Last week** - displays library items where the date displayed in the library item's Date field is a date within the previous week.
- **Last month** - displays library items where the date displayed in the library item's Date field is a date within the previous month.

The heading RECENT is not selectable.

TYPES (Paperless for Mac only)

Please Note: TYPES is a container only available in Paperless for Mac. It is not available in Paperless for Windows.

TYPES is an area where Paperless maintains smart collections for every document type used in a Paperless library.

In a new library (not based on an existing library), Paperless should maintain three smart collections under TYPES by default:

- Email
- Documents
- Receipts
- Image
- Video

If a new document type is added to a Paperless library, the a smart collection for the new document type should appear under TYPES. If a document type is deleted from a Paperless library, the smart collection for that document type will no longer appear under TYPES.

The smart collections displayed under TYPES are maintained by Paperless automatically and cannot be edited at all.

The heading TYPES is not selectable.

COLLECTIONS

COLLECTIONS is an area where user-controlled containers are organized. Collections, smart collections, and folders are added to COLLECTIONS when they are created; they can also be organized within this area (for example, to assign a collection or smart collection to a specific folder).

There are three types of containers that can be used under COLLECTIONS:

- Collection
- Smart Collection
- Folder

We explain these container types in greater detail [in this knowledge base article](#).

The heading COLLECTIONS is not selectable.

Related Pages

- [What are the differences between collections, smart collections, and folders in Paperless?](#)