Mariner Software

Managing and Configuring Metadata Fields (Details) in Paperless 3

Jim Henson - 2018-12-17 - Managing Library Items and Metadata

Managing and Configuring Metadata Fields (Details) in Paperless 2 or 3

In Paperless 2 or 3, any **metadata field** (e.g. Title, Category, Pages, Size) visible under document information is optional to display. In Paperless 2 or it is possible:

- to choose to hide or display a field for a given document type.
- to create any number of custom fields.
- to maintain a list of values for frequently-used fields (such as Title, Category, and Payment Method).
- to maintain lists of common values for custom fields.

Metadata fields display only for document types that they are **assigned** to. There are two types of metadata fields in Paperless 2:

- **Default Metadata Fields** - Fields that cannot be renamed or deleted, and which type cannot be changed.
- **Custom Metadata Fields** - Fields that allow for either the type or the name to be changed, and that can be deleted.
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This article provides a number of brief how-tos to configure metadata fields in Paperless 2.0. When finished with any of these actions, click the **Done** button to hide Library Configuration and return to the library.

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How to Create a Custom Field

In Paperless 2 or 3 it is possible to create custom fields to handle specific types of data.

To create a custom field in Paperless 2, follow these steps:

1. From the **View** menu select **Show Library Configuration...**
2. The window flips and reveals the configuration window.
3. Select **Custom Fields** from the tabs at the top.
4. Click the **plus button** at the bottom of the first column.
5. **Set the name** for the field and it's type.
6. Click done when you are finished.
7.

How to Show/ Hide and Arrange Fields for a Document Type

All fields (custom and default) are assigned to and arranged for all document types under the Document Types section. *To specify fields to show for a specific document type:*

- Ensure that the custom field you would like to assign has been created and named (see **How to Create and Configure a Document Type**, below, for steps to do this).
- Select the document type from the list of available document types.
- Under the **Fields** list, find the name of the field you would like to display.
- **Drag** the name of the field from the **Fields** list to the **Display Fields** list.

To remove a fields from display for a specific document type:

- Select the document type you would like to remove.
- Under **Display Fields**, locate the name of the metadata field you would like to remove from display for the document type.
- **Drag** the name of the field from the **Display Fields** column to the **Fields** column.

The Display Fields list also shows the order that metadata fields will appear in the Document Information pane. To specify the order that fields display in the Document Information Pane for a given document type, drag a field name under Display Fields list to the position (relative to the names of other fields) where it should appear (relative to other fields) under Document Information.

How to Specify Autofill Values for a Custom Field

A list of autofill values for each custom metadata field is kept under the **Custom Fields** section of Library Configuration. *To create a new autofill value for a custom field:*

- Select the custom field to add autofill values for.
- Click the plus (+) button beneath the list of autofill values to create a new autofill value.

Autofill values for custom fields can be deleted similarly by clicking the minus (-) button beneath the list of autofill values.

How to Create a Document Type

Document types are created under the **Document Types** section in Library Configuration. To create a new document type, click the Plus (+) icon underneath the list of document types. Once a new document type has been created, specify metadata fields that should show under the Document Information pane for documents of the new document type using steps under steps to specify fields to show for a specific document type. Document types can be deleted similarly by clicking the minus (-) button beneath the list of document types.

How to Add and Configure Categories and Subcategories

Categories and Subcategories are configured in the **General Fields** pane. Categories can be populated automatically, using information in your user's documents (~/Documents) folder. They can also be populated manually by choosing **Add Default Categories…** from the Help menu.

How to Add Merchants and Titles

Document titles and Merchant names are stored under Merchants/ Titles under the **General Fields** section of Library Configuration. There are two ways to add Merchants/ Titles to a Paperless library:

- **Manual Entry** - Add the names of titles or merchants to the list of Merchants/ Titles list by clicking the plus (+) button below the Merchants/ Titles list.
- **Automatic Population** - Merchants/ Titles can be populated automatically, using information in your user's documents (~/Documents) folder.

When a document is given a name that does not exist in the list of Merchants/ Titles, it will be added to this list automatically. Default Merchants can be populated automatically, using information in your user's documents (~/Documents) folder. They can also be populated manually by choosing **Add Default Merchants…** from the Help menu.

How to Add and Configure Payment Methods

Payment methods can be configured under the General Fields section of Library Configuration. To create a new payment method, click the plus (+) button below the list of payment methods and types. To assign a payment type to a payment method, choose the appropriate payment type from the popup list that appears under the **Type** column next to the payment method's name.