Mariner Software

Using Smart Collections in Paperless

Customer Service - 2018-12-17 - Managing Library Items and Metadata

Smart Collections make it possible to organize library items automatically. Smart collections are saved searches that display library items automatically if details information that displays in specific fields (within the Details pane) matches search statements specified for the smart collection. This article will outline how smart collections can typically be expected to work and how to use them to organize library items.

How smart collections work

Smart collections are containers that display library items that match search parameters specified for the smart collection. Paperless displays library items in smart collections conditionally, depending on whether details information stored for the library item matches search criteria specified for the smart collection.

Here are the conditions Paperless uses to determine which library items to display:

- If information that displays for a library item in a specific field in the Details pane matches search statements used to configure the smart collection, Paperless displays the matching item within the smart collection.

- If information that displays for a library item in a specific field in the Details pane does not match search statements used to configure the smart collection, Paperless does not display the library item within the smart collection.

Search criteria for a smart collection are stored as search statements. A search statement is a condition for a match. For example, if a smart collection is configured to match library items where the **Title/ Merchant** field contains `Mariner Software`, then the only library items that should display within the smart collection are library items that satisfy this search criteria.

Smart collections can be configured to display library any library items that match any of the search statements specified for the smart collection or only library items that satisfy all of the search criteria.

Smart Collections Use Search Statements

Smart collections return library items that match search statements. A search statement in a Paperless smart collection typically looks something like this:

```
[Field] [Operator] [Value]
```

- **Field:** a search statement selects a specific field to search within.

- **Operator:** an operator is a verb that provides some sort of logic (such as is, contains, or is greater than) to the search statement.

- **Value:** the value is the data the smart collection will be searching for (related to the operator: `is greater than $29.99` or `is last year`

Here are some examples of search statements that can be specified within a smart collection:

Field	Operator	Value
Title	is	Apple Store
Amount	is greater than	$0.00
OCR Text	contains	Rebate
Tags	contains	Christmas present
Payment Method	is	Check
Date	is between	1/1/2013 and 12/31/2013

These search statements were taken from Paperless for Mac; Paperless for Windows uses a slightly different list of operators (for example: in place of *is*, Paperless for Windows uses **is equal to**). We provide [documentation of smart collections specific to Paperless for Windows starting on page 38 of the Paperless for Windows User Guide](#).

Where smart collections search

By default a smart collection searches any library item in your library. If a library item displays within LIBRARY, the smart collection will include the library item if its details information matches the search criteria.

If a smart collection displays within a folder, the smart collection will only search the contents of the folder. The library item will search library items assigned to collections subordinate to the same folder the smart collection displays within.

- The smart collection will search library items assigned to any collections that appear in the same folder that the smart collection appears within.

- The smart collection will search library items assigned to any collections that appear in folders subordinate to the folder the smart collection appears within.

[We outline the differences between container types (collections, smart collections, and folders) in this knowledge base article](#).

Configuring smart collections

To configure a smart collection to search for library items, follow these steps:

1. Add a name for the smart collection.

2. Configure any search statements the smart collection will use.

   To create additional search statements, click the plus button on the right-hand side of the window.

3. Specify whether the smart collection should match **any** or **all** of the specified search criteria.

   Any should return any library item that matches at least one search statement.

   All should only return library items that match all search statements specified for the smart collection.

4. Click **OK**.

5.

How to create a smart collection

A new smart collection can be created by selecting **New Smart Collection...** from the **File** menu.

How to make changes to an existing smart collection

In both Paperless for Mac and Paperless for Windows, it should be possible to make changes to an existing smart collection by right-clicking (or--on a Mac--holding the control key down and clicking) on the name of the smart collection in the source list and selecting **Edit Smart Collection** from the contextual menu that appears.

Selecting Edit Smart Collection should display the smart collection configuration dialog.

Frequently Asked Questions

A smart collection is not returning the library items I expect it to. How can I resolve this?

In most cases, it should be possible to resolve issues where smart collections do not return library items they are expected to return by following these troubleshooting steps (in order):

1. **Make sure the smart collection will match library items in the location you**

expect it to. If you expect the smart collection to search every library item in your library, make sure that it is not contained within a folder. If a smart collection is expected to search the contents of a folder, make sure that the smart collection is added to the folder that it is expected to search the contents of.

2. **Review the configuration sheet for the smart collection**, to ensure that the the search statements display as expected.

3. **Review the library items you expect the smart collection to match**, to ensure that data appears within the details fields matches the search criteria the smart collection has been configured to search for.

If it is not possible to resolve an issue where smart collections are not returning library items as expected by following these steps, please contact us for support.

I don't see an option to select the Merchant field at all in Paperless for Mac. How can I create/ configure smart collections that search the Merchant field?

In Paperless for Mac should be possible to search the merchant field with a search statement that targets the **Title** field.

Is it currently possible to save searches from the Search field in the Paperless toolbar?

No: at this time it is not possible to save searches directly from the Paperless toolbar either in Paperless for Mac or Paperless for Windows.

Is there a smart collection that will search all fields?

Smart collections only search fields targeted by search statements. There is not currently a way to configure a smart collection that will search every field with one search statement. If enough search statements were specified for a smart collection to target every available field, it stands to reason that the smart collection should search every field as configured.