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What are the different container types in Paperless, and how can I use them to organize library items?

Customer Service - 2024-04-29 - Managing Library Items and Metadata

- What are the different **types of containers** in Paperless
- What are the **differences** between the three container types:
 - **Collection**
 - **Smart Collection**
 - **Folder**
- **How can I use the different container types** to organize library items in Paperless?

In Paperless, all library items show under the Library heading (at the top of the Source Pane). It is possible, though, to use **containers** (elements used to sort library items) to sort, separate, or automate searches for specific documents in one of two different places:

- **in Library (globally)**, searching all library items in your Paperless library)
- **within another container** (searching all library items within a specific area within your library)

Container Types

Collection (or *Static Collection*)

A collection is a container that library items are organized into. **The user manages which library items appear in the collection** by adding or removing the library items manually.

Smart Collection

A smart collection is another type of container that library items are organized into. The user sets parameters for a smart collection to search for (for example: 'Title' contains "XYZ") and **Paperless will automatically display library items that match the specified parameters.**

Folder

A folder is a container that can contain **collections, smart collections**, and other folders. Folders make it possible to organize other containers.

Folders cannot contain library items; they can only contain other containers.

Collections, smart collections, and folders are added to a smart collection manually, by the user.

Using Containers

Here are some tips for using containers in Paperless:

Specifying the locations a smart collection searches for library items within

Where a smart collection searches depends on the location the smart collection is organized to:

- If a smart collection is **added to a folder**, it will only search the **contents of the folder that contains it**.
- If a smart collection is **not added to a folder**, it will search your Paperless library **globally** (your whole library at once).

How do I remove a library item from a collection or smart collection?

How do I remove a container from a folder?

All containers are organized hierarchically. Adding a container to a folder is very-similar to adding one folder to another in Windows Explorer.

To remove a container from a folder:

1. Click (and hold) on the container.
2. Drag the container to a point outside of the folder's hierarchy.
3. Release the mouse (to drop the container).

Does Adding a library item to a collection or smart collection duplicate library items?

No. Adding a library item to a collection or smart collection does not duplicate the library item.