



SHAREPOINT 2007

USING METADATA TO REPLACE SUBFOLDERS

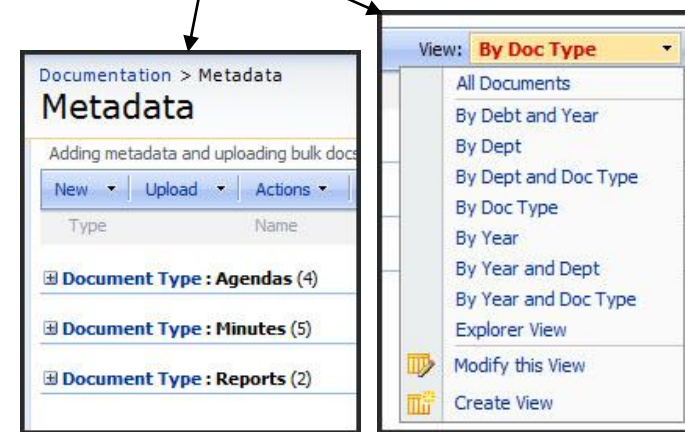
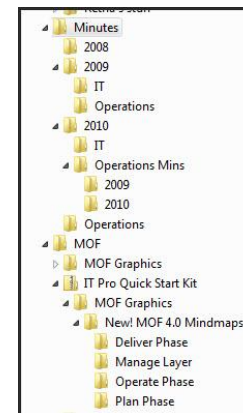
PURPOSE

The traditional way of storing documents has been in folders and subfolders, (and all in the Shared Documents library!).

There is a lot of duplication and confusion, and when users can't find the right folder they invariably just make new subfolders.

What we are going to do is replace all the sub folders with metadata and create views to far better manage the storing of documentation.

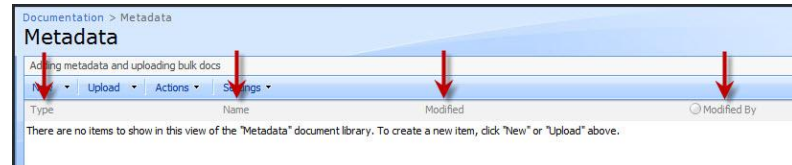
It will also be one point of truth for users – one place to upload everything, not dozens of subfolders.



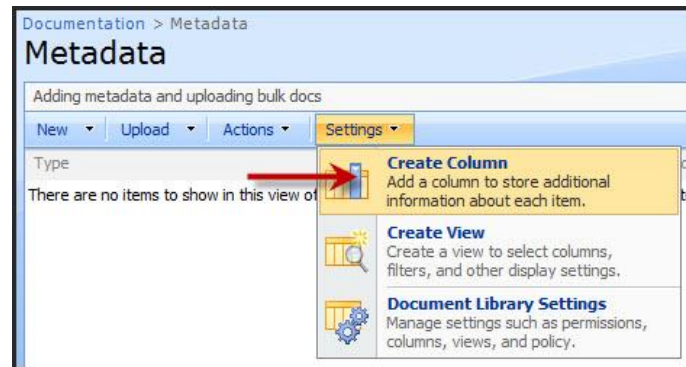


INSTRUCTIONS

a) Create a **Document Library**. Note the default metadata, **Type**, **Name**, **Modified** and **Modified By**. We'll add our own columns next.



b) Click **Settings – Create Column**.



TIPS...

- ★ Metadata is information about information; columns, tags, properties, columns – it's all the same thing.
- ★ You need to do proper analysis of your file shares instead of just bulk uploading your documents. Junk in junk out.



- c) Insert a **Column Name** called Document Type and select the **Choice Field**.
- d) Add 3 document types Minutes, Agendas, Reports to the Choice #1, 2, 3 block.
- e) Make them **Radio Buttons**, (less clicks).
- f) Make sure the **Default Value Choice** field is empty – it will default to the first choice you specified, delete that text from the box. Do NOT untick the **Add to Default View** though. Click **OK**.

Column name: Document Type

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (checkbox)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Business data

Description:

Require that this column contains information:
 Yes No

Type each choice on a separate line:
 Minutes
 Agendas
 Reports

Display choices using:
 Drop-Down Menu
 Radio Buttons
 Checkboxes (allow multiple selections)

Allow 'fill-in' choices:
 Yes No

Default value:
 Choice Calculated Value

Add to default view

OK Cancel

- g) Create a second column for year also as a choice field and add 3 years. And a third for Department.

Column name: Year

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)

2008
2009
2010

- h) Go back to your library and note the new columns.

Metadata

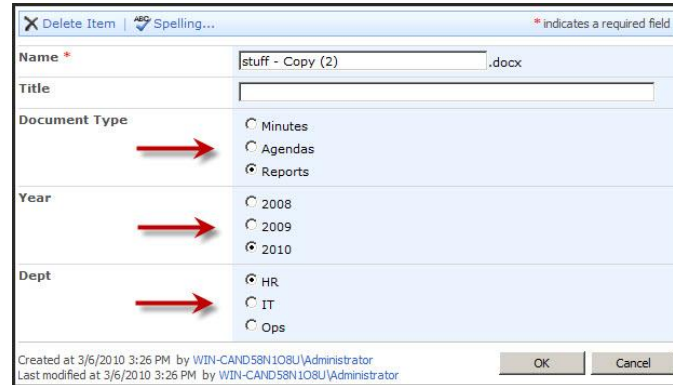
Adding metadata and uploading bulk docs

New Upload Actions Settings View: All Documents

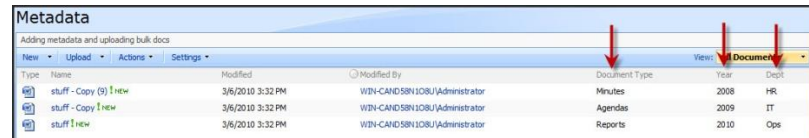
Type	Name	Modified	Modified By	Document Type	Year	Dept
There are no items to show in this view of the "Metadata" document library. To create a new item, click "New" or "Upload" above.						



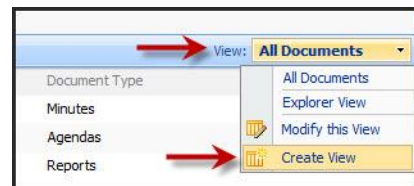
- i) Upload one document. Note the fields you've just created. Fill in the options and click **OK**.
- j) Upload another document that has a different name to the first one, and this time choose different metadata options to the previous one.



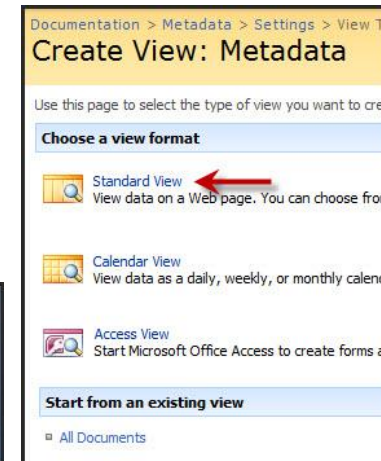
Note how each document has the metadata fields completed. It doesn't mean much in this format, but the beauty of **SharePoint** comes with the **Views** you can now create based on your metadata.



- a) While in the **Document Library**, click on **View : All Documents – Create View**.

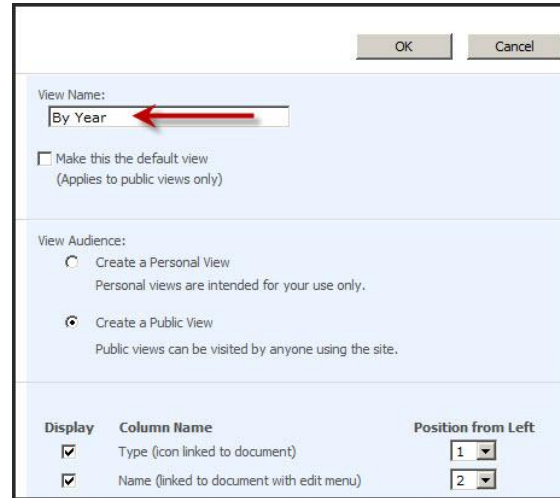


- b) Choose **Standard View**.

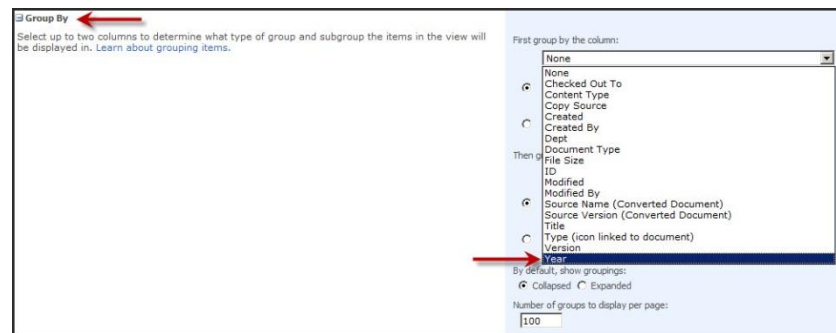
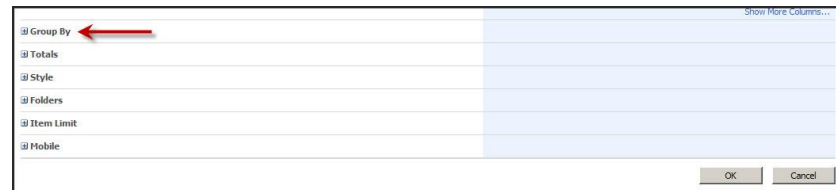




c) Call it *By Year*. Leave all the settings as is and scroll all the way to the bottom.



d) Expand the **Group By** option and in the first group, click on the dropdown and choose Year. Click **OK**.
(Make sure you aren't in the **Sort** or **Filter** options, it's a common mistake).





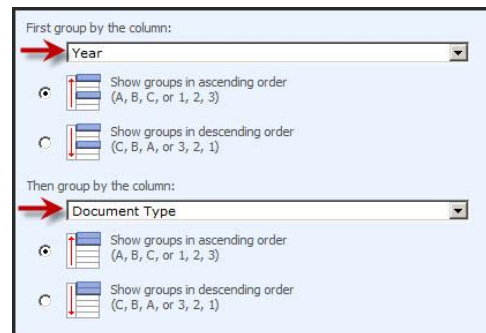
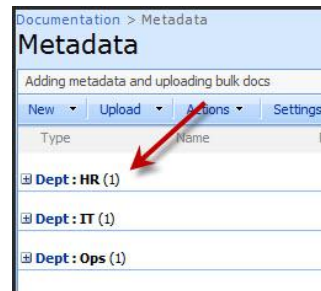
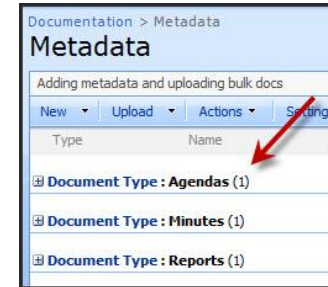
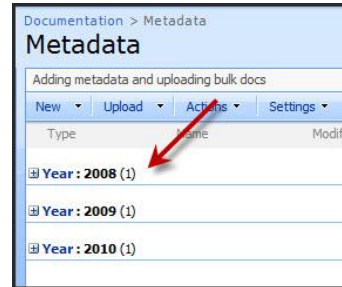
e) Note how your documents are now categorized. Click on the **+** to expand the “subfolder” to view the documents.

f) Go and create 2 more views, one for Document Type and one for Department using the same process as for Year but just changing the **Group By** selection to the appropriate view.

Now you have 3 views in one **Document Library**, one place to upload documents which will automatically sort if the metadata is completed properly.

Let’s put a second grouping in.

- a) Create another view called By Year and Doc Type.
- b) In the **Group By** section, put Year in the first dropdown and Document Type in the second one. Click **OK**.



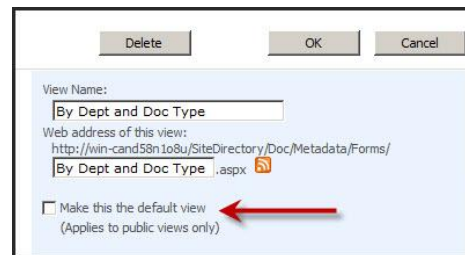
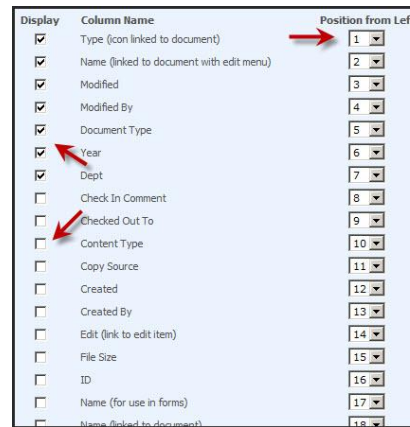
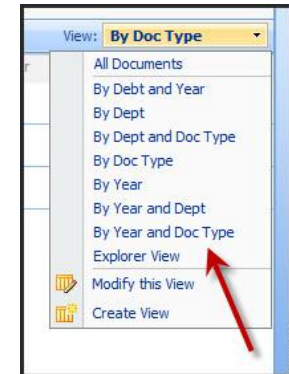
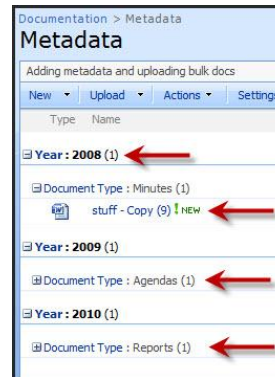


- c) Expand the link next to Year to view the Document Type, expand that one to view the documents inside the “folder”.
- d) Create 3 more views, By Year and Department; By Department and Doc Type, and by Doc Type and Department.

From just 3 metadata tags we have created 7 different views! As you upload documents, each view is automatically updated showing the number of documents in each category. No more subfolders!

- e) You can modify any view by clicking the dropdown on the **Views** and **Modify This View**. All the tick boxes are available for display. When you get more confident you can try **Sorting**, **Filtering**, etc.

- f) You can also decide which view must be the **Default View**, in other words, when users click on that library what do they see first. And to delete it, click **Delete**.





TIPS...

★ The very loose rule of thumb when choosing dropdown or radio buttons on choice fields is if there are 5 options or less, choose radio buttons. Less clicks for users.

★ If you have users that are determined to use subfolders, call the Column heading “Folder” to make them more comfortable with the transition. You’d be surprised how often this works.

★ Disable the subfolder option on a library altogether to prevent folder sprawl in the **Settings – Document Library Settings – Advanced Settings**.

★ The other cool thing is you can now pick up when metadata is not completed then easily navigate just to that document to put the information in, (hover over the document and use the dropdown arrow to click on **Edit Properties**).

★ You may not realise it, but you have been using metadata for years. Every subfolder in file shares is a metadata tag. SharePoint just leverages and displays them differently, and makes them easier to manage.

