



SHAREPOINT 2010

USING METADATA TO REPLACE SUBFOLDERS

PURPOSE

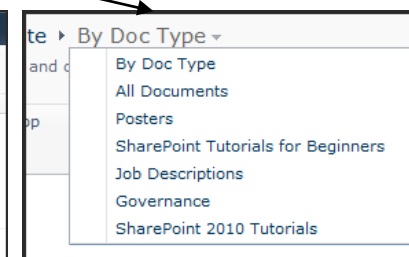
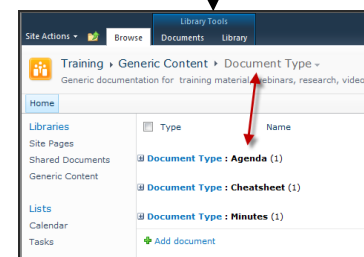
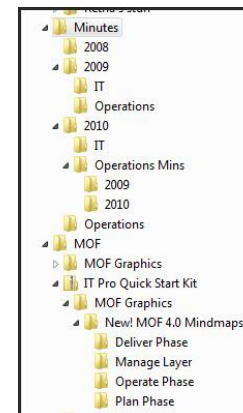
The traditional way of storing documents has been in folders and subfolders, (and all in the Shared Documents library!).

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.

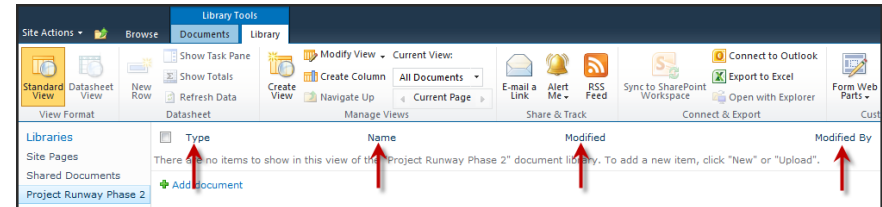
You may not realise it, but you have been using metadata for years. Every subfolder in fileshares is a metadata tag. SharePoint just leverages and displays them differently; and makes them easier to manage.



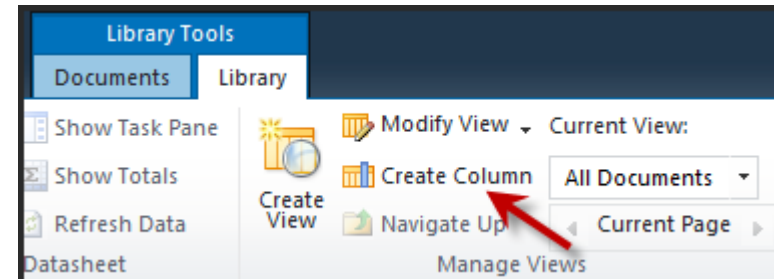


INSTRUCTIONS

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



b) Click **Create Column** in the ribbon under the **Library** tab.

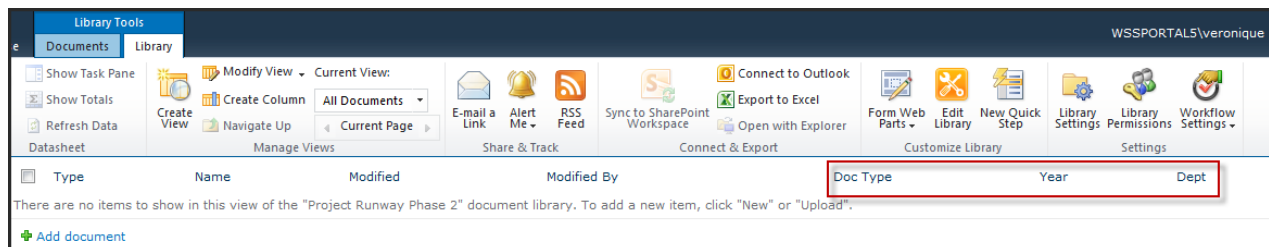
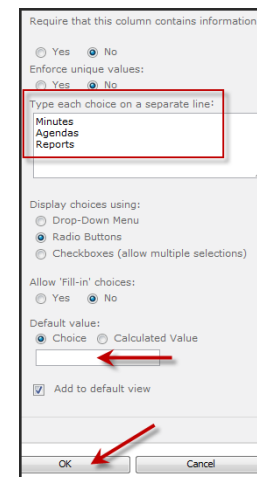
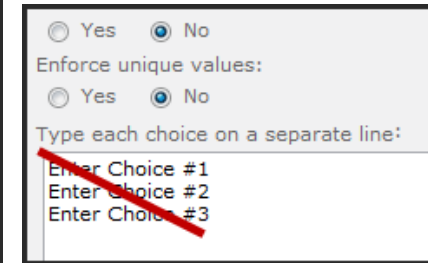
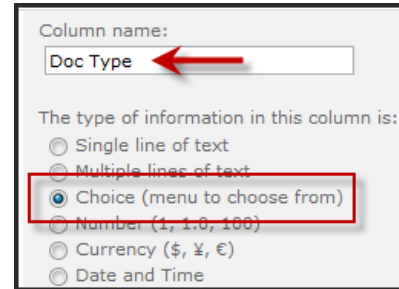


TIPS...

- ★ 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 document types to the Choice #1, 2, 3 block.
- e) Make them **Radio Buttons**, (fewer 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.
- g) Do NOT untick the **Add to Default View** though. Click **OK**.
- h) Create a second and third column called Year and Department respectively in exactly the same way.
- i) The new columns display in your library.

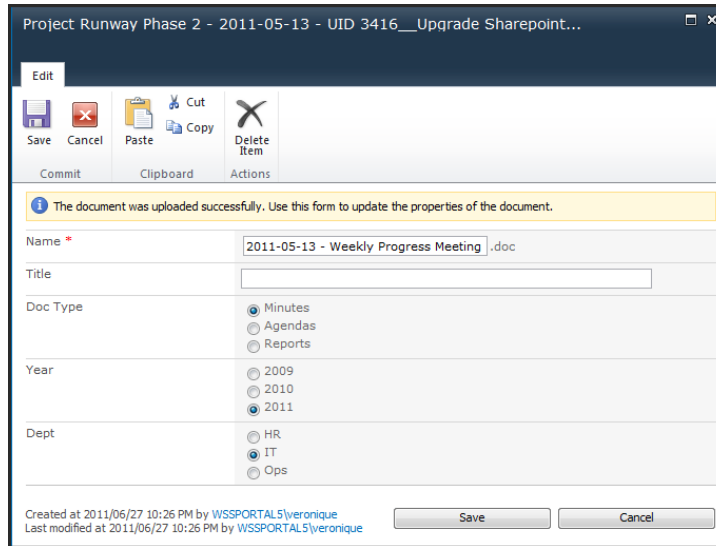




j) Upload one document. The columns you've just created are available as choice fields on upload. Fill in the options and click **Save**.

k) Upload another document that has a different name to the first one, and this time choose different metadata options to the previous one.

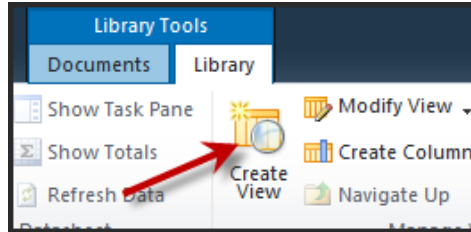
See how each document has the metadata fields completed. It doesn't mean much in this format, but the beauty of **SharePoint** comes with the **Views** you can now create based on your metadata.



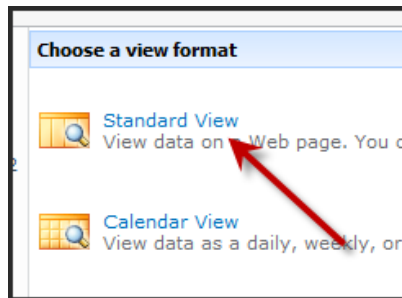
Type	Name	Modified	Modified By	Doc Type	Year	Dept
	2011-04-25 - Agenda Licensing Meeting NEW	2011/06/27 10:30 PM	WSSPORTAL5\veronique	Agendas	2010	HR
	2011-05-13 - Weekly Progress Meeting NEW	2011/06/27 10:28 PM	WSSPORTAL5\veronique	Minutes	2011	IT
	Site Collection Settings NEW	2011/06/27 10:31 PM	WSSPORTAL5\veronique	Reports	2009	Ops



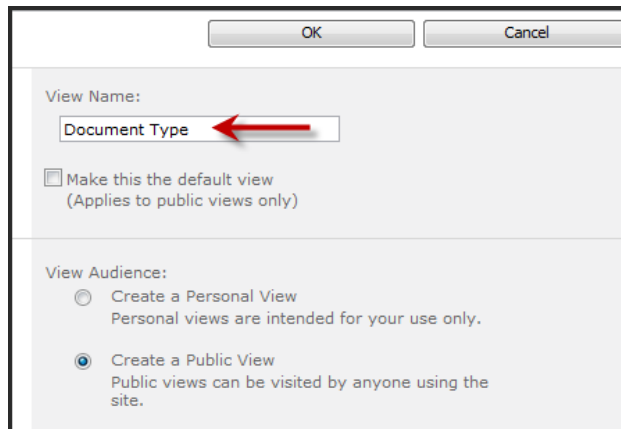
a) While in the **Document Library**, click on **Create View** in the ribbon.



b) Choose **Standard View**.



c) Name the view **Document Type**. Leave all the settings as is and scroll all the way to the bottom.

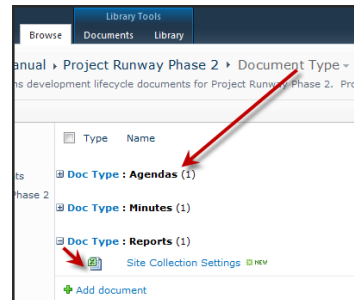




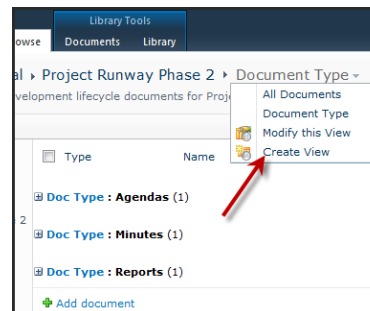
d) Expand the **Group By** option and in the first group, click on the dropdown and choose Year. Click **OK**.
(Make sure you aren't in the **Sort** or **Filter** options, it's a common mistake).



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

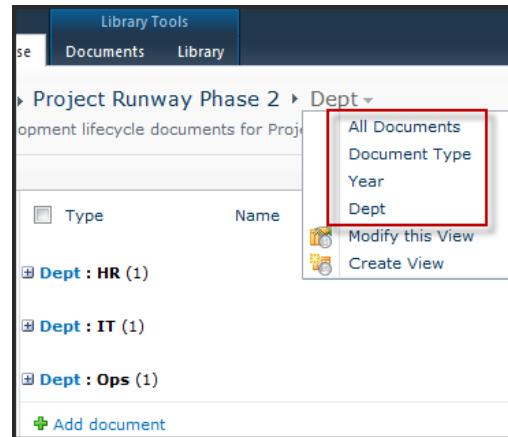


f) Go and create 2 more views, one for Year and one for Department using the same process as for Document Type but just changing the **Group By** selection to the appropriate column. You can use the dropdown arrow on the view list to do this too.



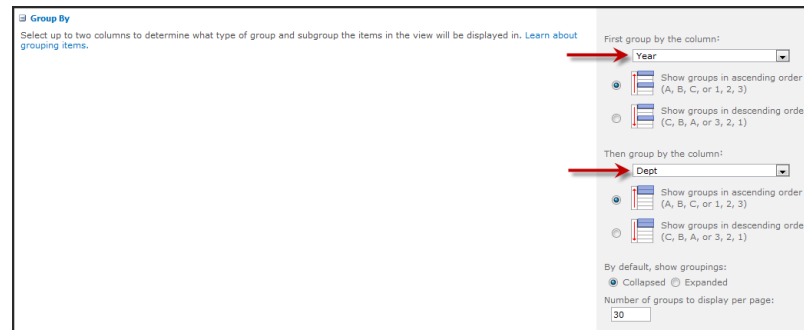


Now you have 3 views in one **Document Library**, one place to upload documents which will automatically sort if the metadata is completed properly. Use the All Documents option to 'flatten' the view again.



Let's put a second grouping in.

- Create another view called Year and Dept.
- In the **Group By** section, put Year in the first dropdown and Dept in the second one. Click **OK**.



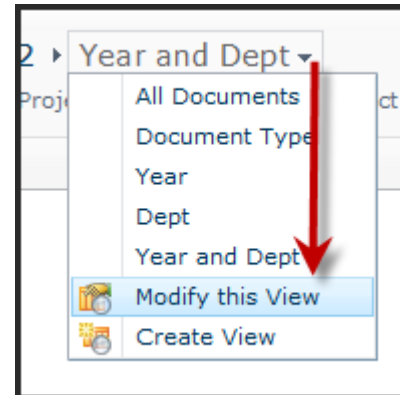


c) Expand the link next to Year to view the Document Type, expand that one to view the documents inside the “folder”.

From just 3 metadata tags you can create dozens more views! As you upload documents, each view is automatically updated showing the number of documents in each category. No more subfolders!



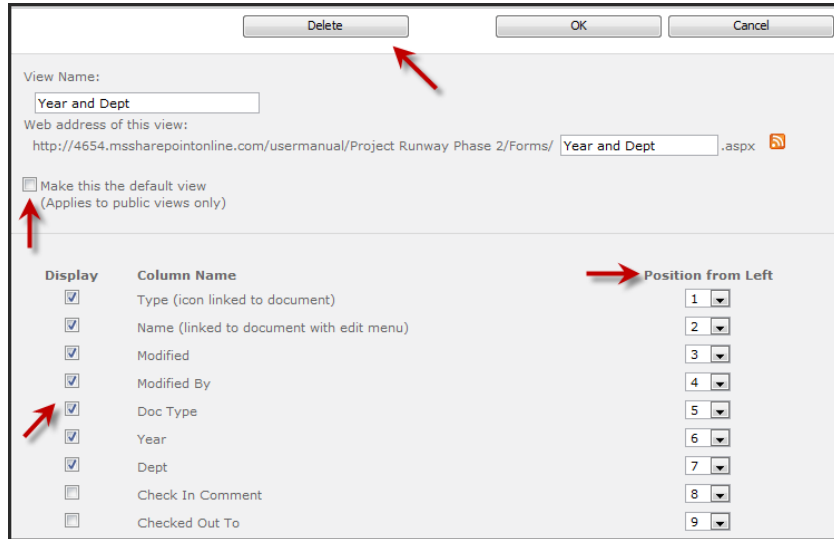
d) You can modify any view by clicking the dropdown on the views and **Modify This View**.



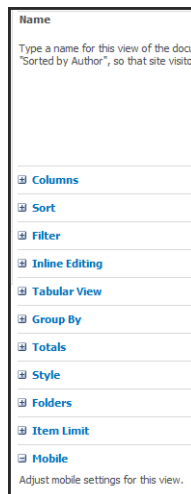


e) All the tick boxes are available for display. Tick and untick them as required, and re-order them from the **Position from Left**. Long as you aren't scrolling left and right, you're doing ok.

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**.



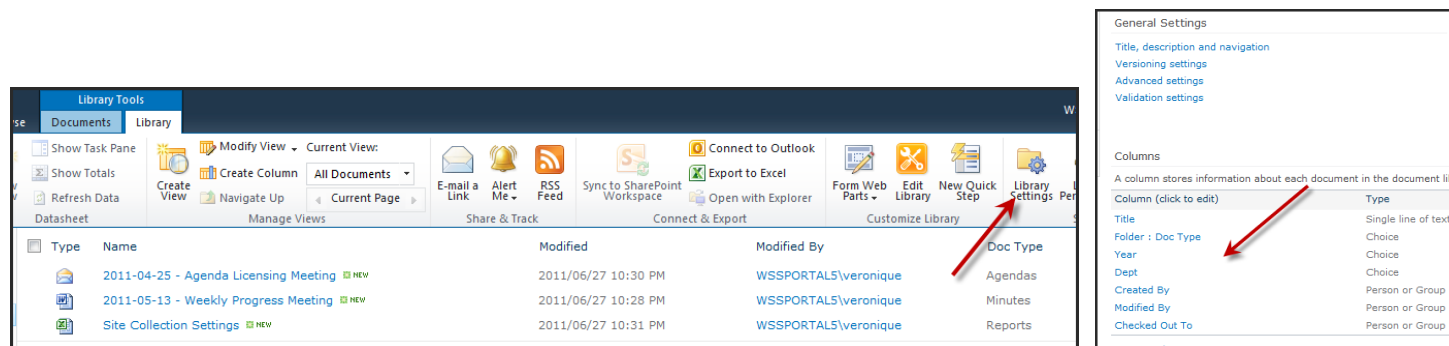
g) When you get more confident you can try **Sorting**, **Filtering**, etc.





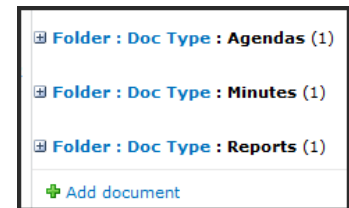
TIPS...

- ★ To edit your columns, go to the **Library Settings**, then scroll down to the **Column** section. Click on the applicable column to edit it.

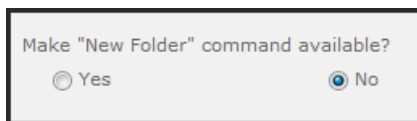


- ★ The very loose rule of thumb when choosing dropdown or radio buttons on choice fields is if there are 5 options or less, choose radio buttons. Less clicks for users. You can add as many or as few options as you like.

- ★ 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.

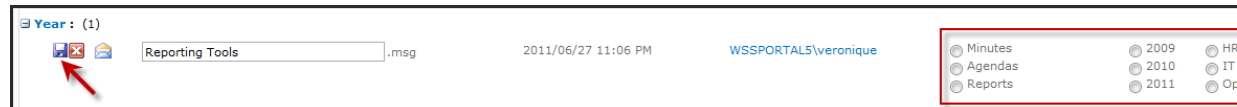
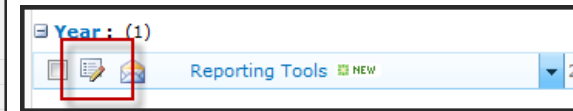
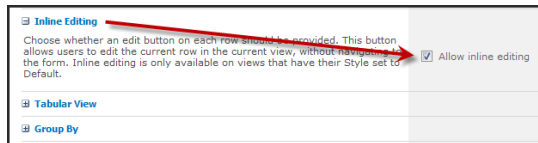
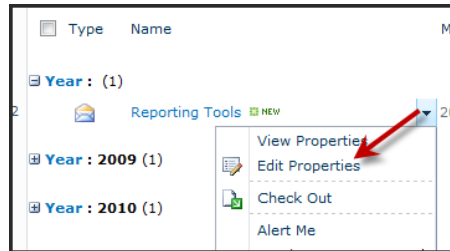


- ★ Disable the subfolder option on a library altogether to prevent folder sprawl in the **Library Settings – Advanced Settings**.





- ★ 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**. Alternatively, activate Inline Editing.



- ★ Or to bulk edit metadata, use Datasheet View! Click in the empty white blocks to fill in the data. Use the dropdown arrow, or type the first few letters, or copy and paste from adjacent cells. When you're done, click Standard View. If you get a message that says "you have pending changes, do you want to wait"; say Yes or you will lose all the changes you just made. You have just typed too fast for SharePoint to think and it's playing catch up. 😊

