Blowing Up Your Folders – The SharePoint Paradigm Shift

…how to get more value from your SharePoint document libraries

But I really like my folders …

- Content in files shares is typically stored in a collection of nested folders organized in a way that probably made sense to the person who set them up, but may or may not make sense to others.
  - ➡ For example, on an IT Department Shared Drive there might be a folder for every project.
    - ■ Within each project, there might be a folder for Status Reports, another folder for Deliverables, another folder for Project Plans.
      - ▫ Within the Deliverables folder, there might be a folder for January, and another for February, and another for March
        - ▪ Within the January folder, their might be a folder for Drafts and another for Final documents.
- If you try to find information in a series of nested folders, you have to do a lot of clicking to find what you are looking for.
- But what if you are the program manager responsible for multiple projects and you want to see the most recent Status Report for each of the projects you manage?
- And what if tomorrow, you want to see all deliverables created by John Smith, for any project he is working on?

The trouble with folders … sort of like the trouble with tribbles – they just keep multiplying!

- Many clicks to get to the content you are looking for

- Inflexible – you either put the same content in two different folders if it applies to more than one folder, which immediately creates version control challenges, or you have to live with the structure you created and make sure all users understand how to correctly put documents "where they are supposed to go"

- Doesn't let you easily sort, filter, and create ad hoc views of your content – assumes you know today how you might want to see your content tomorrow

<u>Can</u> you use folders in SharePoint?

- Yes – folders can provide the same useful "collection" features in SharePoint that they do in other types of files storage
  - ➡ For example, the Marketing Department wanted to create a way to group a Brochure, instructions for using the brochure with customers, and a template for a cover letter to use to send the brochure to the customer. The department had about 30 different brochures that they published.
  - ➡ The solution was to create 30 folders, each named with the brochure name.
  - ➡ All three documents related to the brochure were stored in the folder so that it would be easy to ensure that users would know that they should reference all three documents when they want.
  - ➡ But, we also created a view of the document library <u>without</u> the folders so that users could use SharePoint's sorting and filtering capabilities
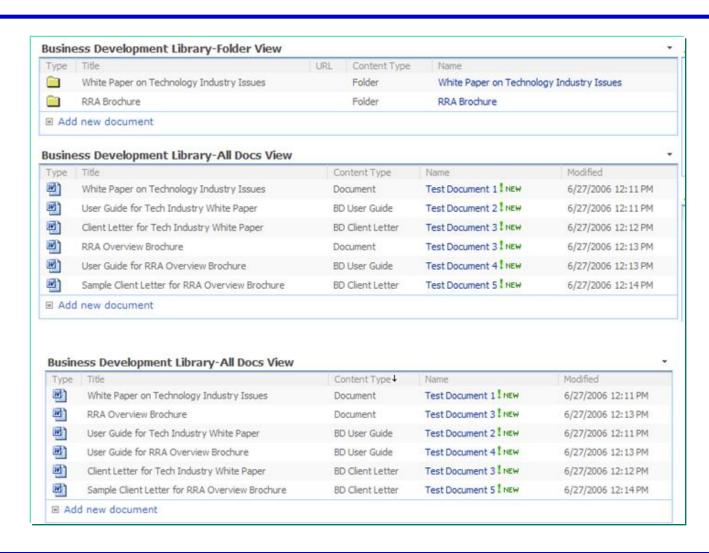- But, in most cases you don't need them!!!

Examples of Effective Use of Folders in SharePoint

View 1: Folders

Business Development Library-Folder View

Type	Title	URL	Content Type	Name
📁	White Paper on Technology Industry Issues		Folder	White Paper on Technology Industry Issues
📁	RRA Brochure		Folder	RRA Brochure

⊞ Add new document

View 2: Folders "assumed" but not visible

Business Development Library-All Docs View

Type	Title	Content Type	Name	Modified
📄	White Paper on Technology Industry Issues	Document	Test Document 1 ! NEW	6/27/2006 12:11 PM
📄	User Guide for Tech Industry White Paper	BD User Guide	Test Document 2 ! NEW	6/27/2006 12:11 PM
📄	Client Letter for Tech Industry White Paper	BD Client Letter	Test Document 3 ! NEW	6/27/2006 12:12 PM
📄	RRA Overview Brochure	Document	Test Document 3 ! NEW	6/27/2006 12:13 PM
📄	User Guide for RRA Overview Brochure	BD User Guide	Test Document 4 ! NEW	6/27/2006 12:13 PM
📄	Sample Client Letter for RRA Overview Brochure	BD Client Letter	Test Document 5 ! NEW	6/27/2006 12:14 PM

⊞ Add new document

View 3: With one click, sorted by Content Type

Business Development Library-All Docs View

Type	Title	Content Type↓	Name	Modified
📄	White Paper on Technology Industry Issues	Document	Test Document 1 ! NEW	6/27/2006 12:11 PM
📄	RRA Overview Brochure	Document	Test Document 3 ! NEW	6/27/2006 12:13 PM
📄	User Guide for Tech Industry White Paper	BD User Guide	Test Document 2 ! NEW	6/27/2006 12:11 PM
📄	User Guide for RRA Overview Brochure	BD User Guide	Test Document 4 ! NEW	6/27/2006 12:13 PM
📄	Client Letter for Tech Industry White Paper	BD Client Letter	Test Document 3 ! NEW	6/27/2006 12:12 PM
📄	Sample Client Letter for RRA Overview Brochure	BD Client Letter	Test Document 5 ! NEW	6/27/2006 12:14 PM

⊞ Add new document

Ways to break the folder paradigm ...

Instead of ...	Try ...
A folder for each project	A site column called Project Name
A folder for each month	A site column called Report Date
A folder for each person	Nothing – SharePoint already has a Created By field so you will always know who created/uploaded a document.
A folder for each Application	A site column called Application with a standard list of values that you can maintain centrally, ensuring that everyone uses the same standard list and spells the names the same way
Browsing for content	Searching using properties or full text search