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
Can 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 without 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

View 2: Folders “assumed” but not visible

View 3: With one click, sorted by Content Type
### Ways to break the folder paradigm ...

<table>
<thead>
<tr>
<th><strong>Instead of ...</strong></th>
<th><strong>Try ...</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>A folder for each project</td>
<td>A site column called Project Name</td>
</tr>
<tr>
<td>A folder for each month</td>
<td>A site column called Report Date</td>
</tr>
<tr>
<td>A folder for each person</td>
<td>Nothing – SharePoint already has a Created By field so you will always know who created/uploaded a document.</td>
</tr>
<tr>
<td>A folder for each Application</td>
<td>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</td>
</tr>
</tbody>
</table>

Browsing for content | Searching using properties or full text search